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Advertising Age

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ASST MNG EDITOR
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4520 EAST-WEST HWY #800
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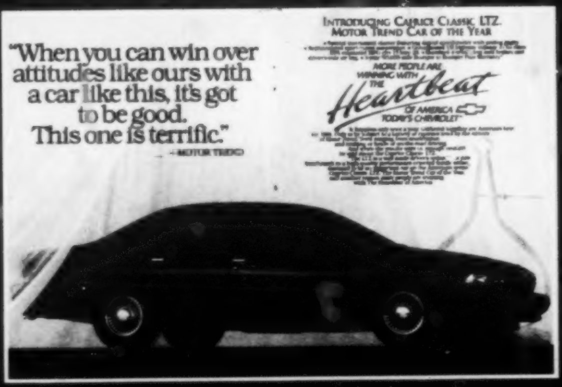
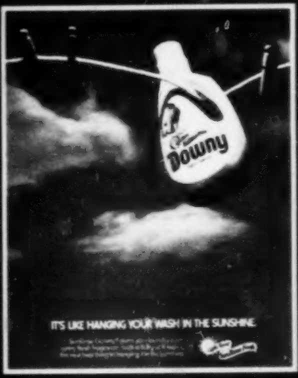
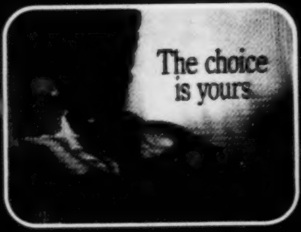
P&G regains #1 spot

Country of Sweden
ABSOLUT TWIST.

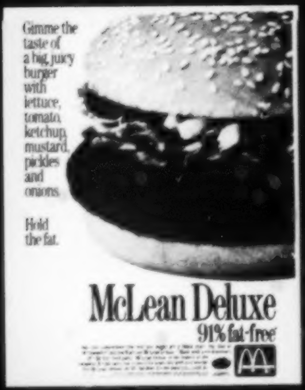

INTRODUCING CAPRICE CLASSIC LTZ.
MOTOR TREND CAR OF THE YEAR
"When you can win over attitudes like ours with a car like this, it's got to be good. This one is terrific."
—MOTOR TREND
MORE PEOPLE ARE WINNING WITH THE Heartbeat OF AMERICA
TODAY'S CHEVROLET

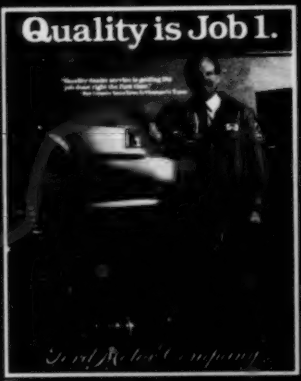

Downy
IT'S LIKE HANGING YOUR WASH IN THE SUNSHINE.


The choice is yours.

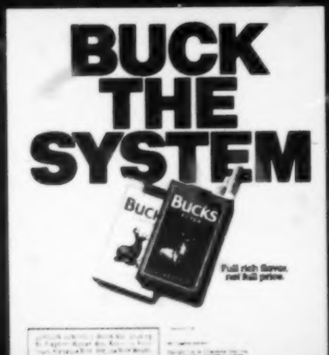
The 100 LEADING

NATIONAL ADVERTISERS


Gimme the taste of a big, juicy burger with lettuce, tomato, ketchup, mustard, pickles and onions.
Hold the fat.
McLean Deluxe
91% fat-free


Quality is Job 1.
Ford Motor Company

When you're traveling abroad, it's nice to hear a familiar voice.
AT&T
The right choice


BUCK THE SYSTEM
BUCKS
Full rich flavor, not full price.

TRUE
Kodacolor Gold 100
COLORS

P&G spends $2.28 billion, surges to head of Top 100

But cuts become commonplace as 43 companies in the select group invest fewer marketing dollars in their 1990 budgets

By R. Craig Endicott

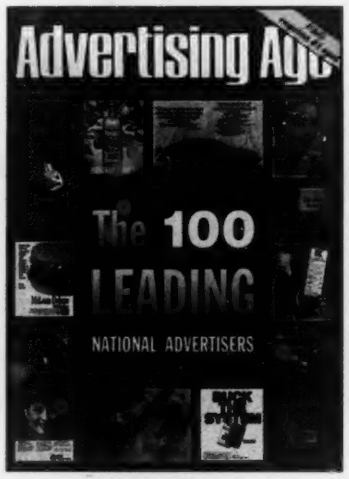
Procter & Gamble Co. rolled forth an advertising budget hike in 1990 that took it to the top of *Advertising Age's* latest ranking of the nation's leading national advertisers.

P&G passed Philip Morris Cos. to retake the lead for the first time since 1987 in the 36th annual *Advertising Age* 100 Leading National Advertisers report.

Powered by a 26.8% increase in U.S. advertising, P&G's outlay soared to $2.28 billion in 1990, overcoming a $293 million margin built by Philip Morris in the prior year.

The surge in P&G's spending, which included more than 30% increases for its toiletries and beauty aids business, diapers and detergents and cleaners, was atypical of the Top 100.

Total U.S. ad spending by the elite group hit $35.6 billion for a 5.6% increase, down from a 6.4% gain in 1989 and a 6.7% advance in 1988. Reduced spending in the fourth quarter clearly had an impact on 1990 totals.



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Total ad spending by media 67
Top 25 network TV advertisers 38
Top 25 cable TV network advertisers 50
Top 25 magazine advertisers 72
Top 25 newspaper advertisers 72

Philip Morris' advertising advanced to $2.21 billion, its more modest 6.6% growth held in check by a huge tobacco division that cut spending 11.6% from 1989. Tobacco advertising accounted for 20% of the company's total.

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P&G, the perennial No. 1 advertiser until acquisitions helped push Philip Morris into the lead, regained the top spot in much the same fashion. Its toiletries juggernaut, accounting for $513.2 million in media advertising, included measured spending of more than $100 million from recent acquisitions: Noxell Corp. and the Max Factor and Betrix lines from Revlon.

Total spending by toiletries and beauty aids alone was an estimated $1 billion with unmeasured advertising folded into media expenditures monitored by LNA/Arbitron Multi-Media Service. Unmeasured media is advertising and promotion that includes such "unmeasured" ad forms as direct response and sales promotion *(see story on Page 71).*

The billion-dollar ad club included No. 3 Sears, Roebuck & Co. and No. 4 General Motors Corp., both at $1.5 billion. Combined, the four accounted for 21% of the total spending attributed to the 100 Leaders.

Aggregate growth of the Top 100 declined from previous years as 43 spent less in 1990 than 1989, a year in which 30 showed declines. An indication that some of those cuts are more than temporary is the fact that half of those operated with either flat or declining ad budgets in the prior year as well. In many cases, marketing budgets took a back seat to payroll cuts, plant closures, debt reduction and even bankruptcy proceedings. Two of the Top 100 are in Chapter 11.

As the economy continued to soften in 1991's first quarter, 36 of the Top 100 spent fewer dollars on their leading brands than in the prior-year period, according to an *Ad Age* study that monitored spending for brands drawing $7.4 million or more in media advertising in the quarter (AA, Aug. 19).

Even so, the nation's top media would have been hard pressed to make ends meet in 1990 without Top 100 spending volumes. The Top 100 accounted for 77.4% of all network TV spending, 42.4% of spot TV, 79.3% of syndicated TV, 42.8% of magazine and 22.5% of newspapers.

The group increased its spending 7.7% in network TV to $7.85 billion; 10.2% in spot TV to $3.94 billion; 1.2% in newspapers to $2 billion; and 29.3% in syndicated TV to $1.26 billion.

The rest of the nation's advertisers bought only 0.5% more network TV than in 1989, 0.01% more newspaper ads, 5.1% more syndicated TV and 1.8% less spot TV, according to LNA/Arbitron.

General Motors led the nation in network TV spending at $593.4 million, up 18.1%; P&G took spot TV honors at $304.5 million, up 39.8%; Philip Morris led magazines with $260 million, down 7.6%, and syndicated TV with $133.8 million, up 25.2%; and No. 30 May Department Stores Co. captured newspapers at $214.4 million, up 5.4%. Only No. 6 PepsiCo lost its position as a media spending leader from '89. It

(Continued on Page 72)

100 Leading National Advertisers

Rank '90	Rank '89	Advertiser	Ad spending in 1990
1	2	Procter & Gamble Co.	$2,284.5
2	1	Philip Morris Cos.	2,210.2
3	3	Sears, Roebuck & Co.	1,507.1
4	4	General Motors Corp.	1,502.8
5	5	Grand Metropolitan	882.6
6	6	PepsiCo	849.1
7	17	AT&T Co.	796.5
8	7	McDonald's Corp.	764.1
9	18	Kmart Corp.	693.2
10	16	Time Warner	676.9
11	8	Eastman Kodak Co.	664.8
12	20	Johnson & Johnson	653.7
13	9	RJR Nabisco	636.1
14	11	Nestle SA	635.9
15	15	Warner-Lambert Co.	630.8
16	10	Ford Motor Co.	616.0
17	24	Toyota Motor Corp.	580.7
18	12	Kellogg Co.	577.7
19	13	Unilever NV	568.9
20	21	General Mills	539.0
21	19	Chrysler Corp.	528.4
22	14	Anheuser-Busch Cos.	459.2
23	33	Walt Disney Co.	435.7
24	22	Bristol-Myers Squibb Co.	428.7
25	26	American Home Products Corp.	415.4
26	29	Sony Corp.	410.5
27	38	Nissan Motor Co.	410.2
28	25	J.C. Penney Co.	393.8
29	28	Coca-Cola Co.	377.2
30	31	May Department Stores Co.	363.6
31	23	Ralston Purina Co.	354.5
32	42	Hershey Foods Corp.	338.7
33	37	Matsushita Electric Industrial Co.	330.2
34	30	Quaker Oats Co.	329.3
35	34	Dayton Hudson Corp.	$318.7
36	39	Honda Motor Co.	318.0
37	32	H.J. Heinz Co.	307.9
38	27	Sara Lee Corp.	306.7
39	36	U.S. Government	304.0
40	46	Pfizer Inc.	279.9
41	40	Federated Department Stores	273.7
42	41	Mars Inc.	272.4
43	35	R.H. Macy & Co.	272.2
44	44	Colgate-Palmolive Co.	265.0
45	56	Mazda Motor Corp.	247.9
46	49	ConAgra	246.1
47	47	Tandy Corp.	232.7
48	45	General Electric Co.	230.2
49	52	American Brands	227.1
50	43	American Express Co.	217.7
51	51	Montgomery Ward & Co.	205.6
52	50	American Stores Co.	204.7
53	53	Adolph Coors Co.	194.6
54	48	Hasbro Inc.	191.8
55	57	SmithKline Beecham	191.4
56	73	Loews Corp.	186.2
57	58	Gillette Co.	181.7
58	99	Nike Inc.	178.8
59	62	Goodyear Tire & Rubber Co.	178.7
60	60	Philips NV	177.7
61	59	U.S. dairy farmers	175.9
62	55	Campbell Soup Co.	175.3
63	61	Clorox Co.	173.4
64	74	Paramount Communications	162.3
65	88	Levi Strauss & Co.	158.9
66	65	S.C. Johnson & Son	158.1
67	72	Carter Hawley Hale Stores	157.4
68	90	United Telecommunications	155.3
69	81	Circuit City Stores	$153.0
70	86	Wal-Mart Stores	151.7
71	54	IBM Corp.	148.7
72	76	Hallmark Cards	146.8
73	111	Helene Curtis Industries	145.4
74	68	Revlon Group	143.6
75	82	AMR Corp.	142.5
76	63	Dow Chemical Co.	141.9
77	67	Mobil Corp.	140.3
78	93	Marriott Corp.	139.6
79	80	Volkswagen AG	138.5
80	64	CPC International	137.0
81	77	Seagram Co.	135.3
82	75	Hyundai Group	135.3
83	84	ITT Corp.	134.9
84	79	Bell Atlantic Corp.	134.2
85	125	Thompson Medical/Slim-Fast Food Co.	133.4
86	92	Kroger Co.	131.1
87	87	Wm. Wrigley Jr. Co.	129.1
88	83	News Corp.	126.7
89	94	Delta Air Lines	126.5
90	71	Citicorp	124.9
91	70	Schering-Plough Corp.	124.9
92	95	Daimler-Benz AG	124.6
93	85	UAL Corp.	123.5
94	91	Nynex Corp.	121.5
95	105	U.S. Shoe Corp.	120.7
96	89	Wendy's International	119.8
97	104	Canon Inc.	119.5
98	96	Bayer AG	115.3
99	123	Upjohn Co.	114.9
100	101	Monsanto Co.	114.6

Note: Dollars are in millions. AA chart: Kevin Brown

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Top 100 entry price: $114 million in ads

RANK: 49

American Brands

New York

Ad spending: **$227.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	60,825	55,627	9.3
Sunday magazine	19,416	14,596	33.0
Newspaper	690	2,312	(70.1)
Outdoor	11,103	10,727	3.5
Network TV	7,123	7,306	(2.5)
Spot TV	173	65	165.3
Cable TV networks	201	465	(56.9)
Network radio	1,353	2,169	(37.6)
Spot radio	0	321	NA
Measured media	100,884	93,587	7.8
Unmeasured	126,200	117,100	7.8
Total	227,084	210,687	7.8
By top brands	**1990**	**1989**	**% chg**
Carlton cigarettes	25,138	32,862	(23.5)
Montclair cigarettes	12,296	0	NA
Malibu cigarettes	11,236	16,798	(33.1)
Acushnet golf equipment	7,820	6,975	12.1
Jim Beam liquor	6,223	4,644	34.0
Pall Mall cigarettes	6,027	8,672	(30.5)
American cigarettes	5,331	843	532.1

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	13,781	11,921	15.6
Earnings	596	631	(5.5)
U.S.	**1990**	**1989**	**% chg**
Sales	4,686	4,522	3.6
Operating income	908	880	3.1
Division sales	**1990**	**1989**	**% chg**
Tobacco	8,037	7,009	14.7
Life insurance	806	831	(3.1)
Distilled spirits	1,005	735	36.7
Office prods	1,025	968	5.8
Hardware	633	503	25.6
Specialty businesses	2,276	1,874	21.4

CORPORATE PROFILE

American Brands' huge U.S. tobacco and liquor franchises are between a rock and a hard place: They compete in flat categories that are falling under increasing public scrutiny.

The company's domestic tobacco business, up only 1.7% in sales to $1.6 billion in 1990, met with deep declines in full-margin cigarette brands that offset gains from value-price business. Overall share declined to 6.8% in 1990 from 7% a year earlier in a market that grew only 0.7% in unit volume.

Similarly, its Jim Beam Brands liquor operation declined from 9.8% to 9.6% of a market that also grew only 1% in volume in 1990. Beer, wine and distilled spirits consumption is declining.

Still, international sales bolstered the company's overall tobacco operations.

Tobacco marketers were hard hit by a federal excise tax on tobacco in 1991. This favored the value-price segment—the growth area at American Brands.

Full-price brands were another matter. Pall Mall slid 15% to 11.9 billion units sold; Carlton Filter dropped 4.9% to 8.5 billion units; Lucky Strike declined 15% to 3.3 billion units; and Tareyton fell 12.4% to 3.3 billion units, according to John C. Maxwell Jr., analyst with Wheat, First Securities.

Ad spending on these brands also headed south led by the 28.4% drop to $19.3 million in support of Carlton Filter, the leader in the Carlton line.

The value-price segment grew to nearly 19% of industry sales, up 4 points from 14.9% in 1989. American Tobacco's market share in the value-price segment grew to 8.7%, up 1.6 points.

American Tobacco introduced in 1990 a number of targeted value-price brands, such as Misty for women, which received $4.7 million in ad spending in 1990.

Bull Durham was rolled out in March. Ad support is expected to run about $12.3 million in the first year.

There was little movement in the company's major liquor brands. Jim Beam bourbon dropped to No. 6 from No. 5 in distilled spirits as case depletions increased 1.2% and market share inched to 2.4% from 2.3%.

The company continues to rank No. 3 in spirits on its 9.6% market share in unit volume, behind Heublein (14.3%) and Jos. E. Seagram & Sons (13.8%); its share is down from 11% two years ago.

Liquor advertising was consolidated at Fallon McElligott in September 1990. Fallon already handled about $8 million in business and picked up work previously handled by Chicago agencies BBDO and Cramer-Krasselt, each with about $3 million.

HEADQUARTERS

American Brands Inc./1700 E. Putnam Ave./P.O. Box 819/Old Greenwich, Conn. 06870-0819/Phone: (203) 698-5000.

PERSONNEL, BRANDS, AGENCIES

AMERICAN TOBACCO CO.: W.J. Moore, exec vp-mktg; R.E. Smith, vp-brand mgr; J.M. Ockers, vp-strategic planning; J.J. Mellett, media/consumer promo dir; K.P. Noone, assoc media/consumer promo dir; W. Degenhardt, media dir asst; J.L. Flavin, asst media planner; J.E. Vyse, mktg budget/planning mgr; D.A. Wogerbauer, dir-mktg research; E.M. Ashkin, sr mktg research mgr; M.J. O'Neill, mktg devel dir; C.E. Willoughby, mktg research mgr; T.M. Keane, sr prod mgr; J.C. Bogie, C.J. Brown, M.J. Burns, J.M. Murray, prod mgrs; D.S. Johnston, exec vp-sales; E.J. Gesell, vp-exec sales; T.A. Albert, vp-field sales.

American, Bull Durham, Carlton, Lucky Strike, Malibu, Misty, Montclair, Pall Mall, Tareyton: Lawrence, Charles, Free & Lawson, New York. C. Goldschmidt, chmn. Direct marketing: Clarion Marketing & Communications, Greenwich, Conn. P. Ifland, vp-mgmt super.

FRANKLIN LIFE INSURANCE CO.: Tom Byerly, sr vp-mktg; David Vanselow, vp-comms.

Squires Advertising Agency & Art Studio, Springfield, Ill. Stan Squires, vp.

JIM BEAM BRANDS CO.: J. Edgar Moser, vp-mktg/-adv; Bob Bilocerkowycz, vp-brand mgr; Michael L. Lintner, sr grp prod dir-bourbons/whiskies; Christine Bowdring, grp prod dir-imports/specialties; Nancy Albert, comms dir; Gayle Seinfeld, media mgr.

Jim Beam bourbon, Gilbey's gin, DeKuyper cordials, Windsor Canadian, Pusser's rum, Beam decanters, Sun Tropique, Old Grand-Dad bourbon, Kamora, The Dalmore Single Malt Scotch, imports & specialties: Fallon McElligott, Minneapolis. Joseph Culligan, mgmt super.

ACCO/SWINGLINE: William S. Carvell, vp-mktg/gm, retail prod div; J. William Hubbell, mktg dir-genl office prods; Kenneth Oberg, mktg dir-information processing prods; John Swirsley, prod mgr-retail div; Fred Weiss, vp-mktg devel/-admin, Swingline; Alan Green, mktg dir, Swingline.

ACCO and Swingline workstation accessories, document handling and accessories, fastening products, computer accessories and furniture, general office products, staplers: E.H. Brown Advertising, Chicago. John Derbick, acct exec.

MASTER LOCK CO.: Bob Weis, dir-mktg, Door Hardware div; Steve Williams, dir-mktg, retail; Jett Anderson, dir-new bus devel.

Master Door Locks and Padlocks: Cramer-Krasselt, Milwaukee. William Faude, acct super.

ARISTOKRAFT, INC.: Gary Lautzenhiser, sr vp-mktg/sales.

Aristokraft cabinets & vanities: Juhl Advertising, Elkhart, Ind. Bill Lovejoy, acct rep.

WATERLOO INDUSTRIES: Mike Strickland, dir-mktg sales; R.C. Wojan, dir-intl sales; Marc Ventor, dir-Sears sales; John From, dir-mktg/sales/-healthcare.

Waterloo tool storage products: Connell Communications, Waterloo, Iowa. Connie Sisson, pres.

MOEN INC.: H. Gardner, vp-mktg; R. Moorman, dir-mktg svcs.

Moen faucets and Chicago Specialty plumbing parts: Cramer-Krasselt, Chicago. Dave Hamel, vp-mgmt super.

ACUSHNET CO.: Titleist and Foot-Joy Worldwide: David E. Overmyer, vp mktg; Gerald M. Bellis, dir-prod mgmt, golf balls; J. Thomas Nachmann, dir-prod mgmt, golf shoes; John B. Hoeflich, dir-prod mgmt, golf clubs; Kenneth J. Kotowki, sr prod mgr-golf gloves; Mary Lou Bohn, sr comms mgr. Rubber div: James G. DeMello, sr vp-gm.

Titleist, Foot-Joy: Laner Reingold Britton & Partners, Boston. Fred Criniti, acct rep.

DAY-TIMERS, INC.: Mark LaDouceur, vp-mktg; Keith Snyder, dir-adv.

Time management products: Della Femina, McNamee, Chicago. Tom Lewy, vp-acct super.

KENSINGTON MICROWARE LTD.: Peter DuPont, vp-sales; Carol Andreuzzi, mktg dir.

PERMA PRODUCTS CO.: Don Trammell, mktg mgr; Melinda Denny, adv coord.

VOGEL PETERSON FURNITURE CO.: Charles Summers, dir-mktg; Joellen Englehardt, prod mgr; Jim Roseen, prod mgr.

Office furniture: McKee Advertizing, Elk Grove Village, Ill. Tom Behan, pres.

WILSON JONES CO.: Gregory A. Carlson, dir-mktg; Paul Barrett, natl acct mgr; Jeannette Marsland, prod devel mgr; Richard Lange, information systems mgr; Marvin A. Rosenfeldt, adv mgr.

Wilson Jones office products: Marketing Support, Chicago. Jane Storey, exec vp.

RANK: 50

American Express Co.

New York

Ad spending: **$217.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	34,991	29,675	17.9
Sunday magazine	1,248	1,797	(30.6)
Newspaper	17,729	19,354	(8.4)
Outdoor	488	356	37.1
Network TV	50,581	74,340	(32.0)
Spot TV	30,088	43,985	(31.6)
Syndicated TV	3,798	4,648	(18.3)
Cable TV networks	2,617	2,711	(3.5)
Network radio	4,830	4,136	16.8
Spot radio	7,706	8,666	(11.1)
Measured media	154,055	189,667	(18.8)
Unmeasured	63,600	78,300	(18.8)
Total	217,655	267,967	(18.8)
By top brands	**1990**	**1989**	**% chg**
A.E. credit card svcs	106,652	138,239	(22.8)
A.E. Travelers Cheques	19,282	17,421	10.7
A.E. travel svcs	10,054	11,704	(14.1)
American Express Money Gram	6,309	0	NA
Shearson Lehman	6,225	194	3,108.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	24,322	25,047	(2.9)
Earnings	181	1,157	(84.4)
U.S.	**1990**	**1989**	**% chg**
Sales	19,459	20,617	(5.6)
Pretax income	315	1,239	(74.6)
Division sales	**1990**	**1989**	**% chg**
Travel related services	9,698	8,357	16.0
IDS financial	2,200	1,934	13.8
American Express Bank	1,814	2,100	(13.6)
Shearson Lehman Bros.	10,177	12,501	(18.6)
American Express Info Svcs	827	660	25.3

CORPORATE PROFILE

American Express Co., hurt by troubles at its Shearson Lehman Bros. subsidiary, is gearing up for what it calls a "major marketing campaign" this fall.

The company, which has bought heavily into the World Series this October, is expected to start a new positioning campaign that adopts a "family" approach to marketing its varied card products, including the basic green, Gold, Platinum and Corporate cards, as well as its newer Optima revolving credit card. The move is likely to reshuffle agency assignments to account for substantially reduced spending behind individual cards.

AmEx's 84% earnings decline came largely from a $1 billion loss at Shearson Lehman Bros., now 100% owned by AmEx. Its troubles were assuaged in August 1991 by an infusion of cash from Berkshire Hathaway for an exchange of preferred stock.

Recession-related slowdowns in consumer spending and market share declines also hit the company's Travel Related Services unit, which accounts for 40% of total corporate revenues.

For the six months ended June 30, AmEx earned $520 million, compared with a $300 million loss in the first half of 1990, on revenues of $12.7 billion, up 5.7%. But earnings declined in the travel services unit.

AmEx had 36.5 million cards issued worldwide as of yearend, a 7% increase, according to the company, but the worldwide share of charge volume declined 2 points to 16.4%. In the U.S., AmEx's share fell to 24.5% from 25.2% in 1989, mostly because of inroads by Visa International, which has steadily gained share.

Earlier this year, AmEx introduced an Executive Corporate Gold Card with a $100 annual fee.

Even as the company unifies its general card-marketing efforts, it has introduced promotions to support particular products. For example, *Your Company*, a quarterly magazine introduced in September 1990, targets corporate cardmembers who run small businesses. The magazine runs ads only from its four sponsors: AmEx, IBM Corp., United Parcel Service of America and Cigna Corp.

AmEx cardholders can now charge long-distance calls placed with MCI Communications Corp. and US Sprint, in response to AT&T Co.'s successful Universal card rollout. And "Weekend Privileges," a new campaign to stimulate card use for leisure travel, offers promotional packages and special rates for vacations.

Ad spending dropped 18.8% in 1990. The company's base charge card was supported by $79 million in 1990, a 15% drop. That figure is expected to drop to about $60 million in 1991. Budgets for network and spot TV in particular took a beating, both falling 32%. Much of the decline stemmed from substantial reductions in Gold Card spending.

AmEx's growing publishing arm, which accounts for less than 1% of total revenues, is said to be exploring alliances with other publishers to extend the ad sales power of its titles such as *Travel & Leisure* and *Food & Wine*.

Shearson was split into a retail brokerage called Shearson Lehman Bros. and an investment banking arm, Lehman Bros. The brokerage hired Chiat/Day/-Mojo to replace Ally & Gargano but slashed media ad spending by 43% to $8.5 million.

HEADQUARTERS

American Express Co./American Express Tower/World Financial Center/New York, N.Y. 10285/Phone: (212) 640-2000.

PERSONNEL, BRANDS, AGENCIES

AMERICAN EXPRESS TRAVEL RELATED SERVICES CO.: Joan Bonnette, vp-adv; Peggy Mitchell-King, vp-TRS media planning/buying; Stephen Smith, dir-TRS media planning/buying; Norma Arnold, sr vp-establishment svcs mktg; John Williams, vp-Platinum Card mktg; Lewis Taffer, sr vp-Gold Card mktg; Abby Kohnstamm, sr vp-Personal Card mktg; Brian Kleinberg, sr vp-Optima Card mktg; Peter Bopp, dir-Corporate Card adv; Bruce Grieve, vp-mktg, Travelers Cheque Group USA.

Platinum Card, Gold Card, Personal Card, Optima Card, Corporate Card, Travelers Cheques: Ogilvy & Mather, New York. David Warden, sr vp-exec grp dir. Chiat/Day/Mojo, New York. Steven Friedman, vp-grp mgmt super. Wunderman Worldwide, New York. Debra Brown, sr vp-acct dir.

AMERICAN EXPRESS PUBLISHING CORP.: James Berrion, sr vp-grp publisher, natl mags/publisher-*Travel & Leisure*; Ron Prince, vp-grp publisher, city mags; Doug Fierro, publisher-*Food & Wine*; Alexandra Golinkin, publisher-*Departures*; Amy Rappeport, publisher-*New York Woman*; Joie Davidow, exec publisher/editor-in-chief, *L.A. Style*; Karen Fund, publisher-*L.A. Style*; Thomas Hartman, publisher-*D*; Thomas Casey, publisher-*Atlanta*.

Travel & Leisure, Food & Wine, Departures, New York Woman: Ogilvy & Mather, New York. David Warden, sr vp-exec grp dir.

L.A. Style, D, Atlanta: in-house.

SHEARSON LEHMAN BROTHERS: Debra Isenberg, exec vp-dir mktg/adv; Catherine Kaputa, sr vp-dir adv; Barbara Glasser, vp-adv mgr.

Chiat/Day/Mojo, New York. Martin Grant, sr vp-grp mgmt super.

IDS FINANCIAL SERVICES: Reed Saunders, sr vp-financial planning/mktg; Tom Jennings, ad mgr.

Ogilvy & Mather, New York. David Warden, sr vp-exec grp dir.

RANK: 25

American Home Products Corp.

New York

Ad spending: **$415.4 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	15,176	15,706	(3.4)
Sunday magazine	0	107	NA
Newspaper	0	272	NA
Outdoor	2	19	(91.4)
Network TV	150,544	156,040	(3.5)
Spot TV	46,851	36,476	28.4
Syndicated TV	9,574	7,323	30.7
Cable TV networks	10,828	9,853	9.9
Network radio	1,340	2,291	(41.5)
Spot radio	19	1,533	(98.8)
Measured media	234,334	229,619	2.1
Unmeasured	181,100	177,400	2.1
Total	415,434	407,019	2.1
By top brands	**1990**	**1989**	**% chg**
Advil pain reliever	47,914	47,941	(0.1)
Anacin pain reliever	28,691	29,415	(2.5)
Dimetapp cold products	24,086	21,635	11.3
Robitussin cough products	20,990	16,888	24.3
Dristan cold products	16,414	17,136	(4.2)
Chef Boyardee pasta products	15,907	16,905	(5.9)
CoAdvil cold remedy	15,457	9,604	61.0
Pam No Stick cooking products	8,790	9,446	(6.9)
Chef Boyardee dinners	8,440	1,481	469.8
Preparation H products	8,320	9,078	(8.3)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	6,755	6,747	0.1
Earnings	1,231	1,102	11.7
U.S.	**1990**	**1989**	**% chg**
Sales	4,608	4,726	(2.5)
Operating income	1,456	1,056	37.8
Division sales	**1990**	**1989**	**% chg**
Pharmaceuticals	3,463	3,254	6.4
Consumer healthcare	1,299	1,294	0.4
Medical supplies	745	693	7.5
Food prods	853	834	2.3
Household prods	415	650	(36.1)

CORPORATE PROFILE

The food segment is the odd man out now that American Home Products Co. has tightened its focus on healthcare from the June 1990 sale of Boyle-Midway (its household products and depilatory business) for $1.25 billion to Reckitt & Colman.

Healthcare now accounts for 87% of worldwide sales, compared with 55% before the sale.

Boyle-Midway's partial inclusion in 1990 returns distorted financial results. Apart from Boyle-Midway's share, the company would have grown 4.3% in sales compared with 0.1% reported.

The company's food products—largely dominated by the Chef Boyardee brand—in 1990 showed a modest sales increase of 2.3% and an operating income decline of 0.5% from operations mostly within North America. Despite the segment's poor returns and lack of strong global coverage, it received strong marketing support during 1990.

Chef Boyardee Hamburger Italiano line carved out a 3.5% share in its second year competing in the $881 million dry-package dinners category, dominated by General Mills' Hamburger Helper and Kraft USA's blue-box dinners, according to Information Resources Inc.'s InfoScan service. Measured spending of $7.7 million behind the line helped push total Chef Boyardee media spending up 44%.

With help from its Microwave Meals line, Chef Boyardee claimed 27% market share in the $1.17 billion shelf-stable canned and microwave dinners category, according to InfoScan. The brand got two new varieties of canned pasta for children in 1990, as Chef Boyardee kept its dominant share of the $700 million canned pasta category.

American Home Food Products also introduced Microwave Meals under other brands in 1990, adding four entree varieties for Ranch Style and six under the Luck's moniker.

AHP's Pam No Stick cooking spray continued to dominate the $97.1 million cooking oil sprays category, claiming a 73% share, according to InfoScan.

The healthcare business continued to benefit from the 1989 acquisition of A.H. Robins Co., whose operations were nearly fully integrated by yearend. In February 1991, Wyeth-Ayerst International and Whitehall International were merged.

Whitehall Labs added Dristan Sinus to its Dristan brand family, backed by $2.4 million in measured spending. Spending emphasis shifted from Dristan regular nasal spray to Long Lasting Dristan Nasal Mist with $3.5 million in media support, up from just $9,600 in 1989.

Advil claimed 11% of the pain reliever category, making it No. 2 behind Johnson & Johnson's Tylenol. Products under the Anacin aspirin brand held 7% of the pain reliever market.

Whitehall added a fourth agency to its stable, moving five brands to Avrett, Free & Ginsberg. The shop gained Arthritis Pain Formula and Semicid, from Young & Rubicam; Compound W, from McCann-Erickson Worldwide; and Freezone and Outgro, from Partners & Shevack, all in New York.

Wyeth-Ayerst, a worldwide leader in female contraception products, in late 1990 won U.S. approval to sell the Norplant System, a reversible, five-year contraceptive implant that's the first of its kind.

HEADQUARTERS

American Home Products Corp./685 Third Ave./New York, N.Y. 10017/Phone: (212) 878-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Corp media buying: John F. Murray Advertising (in-house). Richard Feldheim, pres; Marianne McArdle, sr vp-dir natl TV; Kathleen Margaritov, Patricia Stern, Kenneth Lagana, vps-natl TV supers; Emma Salgado, vp-traffic; William Levengood, TV-dir computer operations; Ingrid Loeuis, vp-treasurer. Mil-Mor Media (in-house). Richard Feldheim, pres; Frances Slaughter, vp-gm.

WHITEHALL LABORATORIES: Andrew Davis, sr vp-mktg; Lyn Ciocca, Holly Crosbie-Foote, vps-mktg; J. Schmitt, vp-new prods; Steve Palmisano, adv dir.

Advil, Anbesol, Clearblue Easy, Clearplan Easy, CoAdvil: Young & Rubicam, New York. Patrick Knisely, sr vp-grp dir.

Dermoplast, Dristan sprays & tablets, Momentum, Oxipor, Preparation H: McCann-Erickson Worldwide, New York. George Biava, sr vp-grp dir.

Anacin, Aspirin Free Anacin (formerly Anacin 3), Maximum Strength Anacin, Denorex, Primatene, Riopan: Partners & Shevack, New York. Alan Yarnoff, exec vp-acct dir.

Arthritis Pain Formula, Compound W, Freezone, Outgro, Semicid: Avrett, Free & Ginsberg, New York. Tom James, exec vp-dir client svcs.

FORT DODGE LABORATORIES: Dr. Wm. E. Ryan, dir adv.

Brady Co., Menomonee Falls, Wis. Bert Hutchinson, sr vp.

AMERICAN HOME FOOD PRODUCTS: John Hilton, sr vp-mktg; Albert Soricelli, sr vp-new ventures; Rick Donnelly, vp-prod mgmt; Jules Neuberger, adv dir.

Chef Boyardee Microwave Meals, Chef Boyardee canned pasta, Ranch Style Beans, Luck's Beans, Pam, new products: Young & Rubicam, New York. Jordan Stanley, sr vp-mgmt super.

Crunch 'n Munch, Chef Boyardee Pizza Mix, Chef Boyardee Hamburger Italiano, Wheatena, Maypo, Jiffy Pop, Dennison's Chili, new products: Lawrence, Charles, Free & Lawson, New York. Al Evans, Al Magnane, exec vps.

Gulden's, new products: Isadore & Paulson, New York. Paul Paulson, pres.

Foodservice: Gordon Hanrahan Inc., Chicago. Mary Ellen Hanrahan, partner.

SHERWOOD MEDICAL CO.: Robert Egan, exec vp-domestic mktg; Jackie Forsland, vp-gm, API.

In-house.

WYETH-AYERST LABORATORIES: Robert Essner, sr vp-sales/mktg; Joseph Beshel, vp-gm, institutional prod; David Bluey, dir-planning/sales/-

mktg; Hector Cabrera, vp-gm, Wyeth-Ayerst Puerto Rico; David Dodd, vp-gm, pediatric/consumer prods; John Leone, vp-mktg operations; Martin Meaney, sr vp-professional prod mktg; David Swingle, vp-professional prod sales.

Bicillin, Oral antibiotics, SMA, Nursoy: Dorland Sweeney Jones, Philadelphia. Barbara Zehender, acct exec.

Ativan injections, Cerubidine: Harrison, Star, Wiener & Beitler, New York. Meg Kelly, acct exec.

Ativan oral, Cycrin, Grisactin, Mysoline, Orudis, Premarin, Serax, Surmontil, Verelan: Klemtner Advertising, New York. Paul Nani, acct exec.

Inderal LA, Inderide LA, Tubex: Lally, McFarland & Pantello, New York. Nancy Barnett, acct exec.

Collyrium, Phenergan suppositories & syrups, Wyanoids Relief Factor: Roberts & Raymond Associates, Philadelphia. Jay Bolling, acct exec.

Cordarone, Sectral, Tenex, Quinidex, Micro-K: Vargas & Levy, New York.

[illegible], LoOvral, Nordette, Norplant, Ovral, Triphasil: Vicom Associates, Philadelphia. Charlie Mathias, acct exec.

Children's Advil: Sudler & Hennessey, New York. Mark Merriman, acct exec.

A.H. ROBINS CONSUMER PRODUCTS: Dennis O'Donnell, VP-mktg.

Dimetapp: Consumer adv: Avrett, Free & Ginsberg, New York. Jack Avrett, chmn. Consumer promo: Earle Palmer Brown Cos., Richmond, Va. L. Bradford Armstrong, pres. Medical adv: Sweeney & Partners, Montvale, N.J. Thomas Sweeney, pres.

Robitussin: Consumer adv: Scali, McCabe, Sloves, New York. Lauren Fisher, exec vp-grp acct dir; Consumer promo: Earle Palmer Brown Cos., Richmond, Va. L. Bradford Armstrong, pres. Medical adv: Sweeney & Partners, Montvale, N.J. Thomas Sweeney, pres.

Chap Stick: Consumer adv: Jordan, McGrath, Case & Taylor, New York. Jack Taylor, vice chmn. Consumer promo: Earle Palmer Brown, Richmond, Va. L. Bradford Armstrong, pres.

Donnagel: Sweeney & Partners, Montvale, N.J. Thomas Sweeney, pres.

RANK: 52

American Stores Co.

Salt Lake City, Utah
Ad spending: **$204.7** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	340	143	137.7
Sunday magazine	132	47	182.6
Newspaper	69,550	81,876	(15.1)
Outdoor	751	790	(5.0)
Spot TV	49,093	48,434	1.4
Spot radio	9,119	7,319	24.6
Measured media	128,985	138,609	(6.9)
Unmeasured	75,700	81,400	(7.0)
Total	204,685	220,009	(7.0)
By top brands	**1990**	**1989**	**% chg**
Lucky food stores	52,363	45,562	14.9
Jewel food stores	20,689	34,685	(40.4)
Osco drugstores	17,582	14,792	18.9
Acme food stores	11,582	11,751	(1.4)
Alpha Beta supermarkets	5,491	7,398	(25.8)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	22,156	22,004	0.7
Earnings	182	118	54.4

CORPORATE PROFILE

American Stores Co., the holding company that owns large food and drugstore chains, expected a tough 1991 because of the slowdown in consumer spending.

The first quarter was "slower than we would like," Jonathan L. Scott, American's president-chief operating officer, told shareholders in June.

Same-store grocery-only sales were up 1% on average in the first quarter, but same-store sales at American's grocery-combination stores dropped 0.55%.

Efforts to retire debt and lower interest payments were helped by the sale of most of American's Alpha Beta stores. In June 1991, American completed the sale of 142 southern California stores to Food 4 Less Supermarkets for $248 million.

The state of California in May 1990 had challenged American's plans to merge its Lucky Stores with Alpha Beta. The sale of the Southern California Alpha Beta stores was part of a consent decree that settled the antitrust suit; American admitted to no violations of the law.

With most of the Alpha Beta stores sold, American probably will change the name of its 75 Skaggs Alpha Beta stores to Jewel Osco units. The company also agreed to sell 51 Osco drugstores in Utah, Colorado and Wyoming to Pay Less drugstores for $60 million, but withdrew Acme Food Stores from the market after rejecting a bid in the $1 billion range.

By June 1991, the company had settled more than 25,000 cases of litigation relating to salmonella-contaminated milk in Jewel Food Stores. American had accrued an additional $32.5 million charge to fourth-quarter 1989 earnings as a result of this litigation.

The biggest change in media spending occurred in network radio, where American spent $9.1 million last year, a category it spent nothing on in 1989.

Spending in newspapers declined 15.1% to $69.5 million but increased 182% in Sunday newspaper supplements, to $131,700.

Lucky had 16.4% of the southern California market early this year, behind Vons Cos.' 17.9% and Ralph's Grocery Cos.' 17.8%. Jewel leads in Chicago at 38%; Skaggs Alpha Beta is tied with Kroger and Tom Thumb in Dallas at 13%, according to *Supermarket News*.

HEADQUARTERS

American Stores Co./5201 Amelia Earhart Dr./Salt Lake City, Utah 84116/Phone: (801) 539-0112.

PERSONNEL, BRANDS, AGENCIES

ACME MARKETS: Bill DiBerndinl, vp-mktg/distribution.

J. Walter Thompson USA, New York. Paul Krause, acct exec.

JEWEL FOODS STORES: William Bolton, vp-mktg; Robert Lutz, dir sales/adv.

Lois/GGK, Chicago. B. Beechen, mgmt super.

STAR MARKETS: Brian Pijanowski, dir mktg.

Rossin, Greenburg, Seronick & Hill, Boston. Evan Saks, acct exec.

AMERICAN DRUG STORES: Arlyn White, exec vp-mktg; Neil Stacey, vp-mktg devel.

Osco drugstores: Lois/GGK, Chicago. Terry Laughlin, acct exec.

SKAGGS ALPHA BETA: Warren Ivie, vp-adv.

Bloom Agency, Dallas. Sherry Babcock, sr vp-mgmt super.

SAV-ON DRUGS STORES: Richard L. Davis, exec vp.

Lois/GGK, Chicago. Terry Laughlin, acct exec.

RANK: 75

AMR Corp.

Dallas
Ad spending: **$142.5** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	14,374	10,172	41.3
Sunday magazine	1,315	990	32.8
Newspaper	60,697	40,985	48.1
Outdoor	421	387	9.0
Network TV	707	10,490	(93.3)
Spot TV	21,062	18,246	15.4
Syndicated TV	193	10	1,828.0
Cable TV networks	753	310	142.9
Network radio	471	509	(7.4)
Spot radio	4,278	13,807	(69.0)
Measured media	104,273	95,906	8.7
Unmeasured	38,200	35,100	8.8
Total	142,473	131,006	8.8
By top brands	**1990**	**1989**	**% chg**
American Airlines	102,619	89,781	14.3

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	11,720	10,480	11.8
Earnings	(40)	455	NA
Division sales	**1990**	**1989**	**% chg**
Passenger	9,743	8,839	10.2
Other	1,266	1,122	12.9

CORPORATE PROFILE

AMR Corp.'s American Airlines is moving ahead on its course to become a global carrier, bolstered by its new presence at London's Heathrow Airport.

American paid $445 million to acquire three U.S.-London routes from Trans World Airlines. The new service—from Boston, New York and Los Angeles to London—began in July.

The acquisition makes American the largest U.S. carrier to the U.K. market, though Delta Air Lines won't be far behind when it completes its purchase of Pan American World Airways' North Atlantic routes.

To launch the Heathrow routes, American ran its largest media campaign ever in conjunction with a service start-up. The carrier spent nearly $20 million, three times more than its major Latin American push last year.

American also plans to expand its Latin American service in December when it increases its weekly flights by 27.5% to 181.

American held onto its No. 1 position in 1990 as the nation's largest carrier, but for the first seven months of 1991 United Airlines shared the lead spot. Both carriers hold an 18.3% share of the U.S. market based on revenue passenger miles, according to PaineWebber. American had a 17% share in 1990 compared with United's 16.6%. Delta was third.

To jump-start air travel last spring, American initiated the largest fare promotion in its history, offering consumers short-term fare specials and new discounts for business travelers. But the move resulted in higher overall fares for the long term.

Still, American Chairman Robert Crandall didn't see "reasonable levels of profitability" returning until the third quarter of 1991. Boardings have been affected by the recession and, in the first quarter, by the Persian Gulf War.

American remains an aggressive marketer. It's just launched a three-year worldwide soccer promotion tied to its sponsorship of World Cup '94 in the U.S.

HEADQUARTERS

AMR Corp./P.O. Box 619616/Dallas-Fort Worth Airport/Texas, 75261-9616/Phone: (817) 963-1234.

PERSONNEL, BRANDS, AGENCIES

AMERICAN AIRLINES: Michael W. Gunn, sr vp-mktg; George L. Mueller, vp-customer svcs; Jack L. Williams, vp-passenger sales; Tom Morris, mg dir-adv; Rob Britton, mgr-adv/dir mktg; Rick Fisher, mgr-intl adv; Ladd Biro, mgr-worldwide sales promo.

Domestic adv: Bozell, Dallas. Paul Gold, exec vp-acct dir.

Intl & Latin America adv: DDB Needham Worldwide, Dallas. Todd Bresnahan, mgmt super-intl; Kathleen Smith, acct coord-Latin America.

RANK: 22

Anheuser-Busch Cos.

St. Louis
Ad spending: **$459.2** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	7,767	8,834	(12.1)
Sunday magazine	243	399	(39.2)
Newspaper	3,989	9,537	(58.2)
Outdoor	6,058	6,148	(1.5)
Network TV	129,009	181,467	(28.9)
Spot TV	91,646	94,835	(3.4)
Syndicated TV	13,703	10,753	27.4
Cable TV networks	26,788	26,300	1.9
Network radio	983	7,707	(87.2)
Spot radio	21,147	42,073	(49.7)
Measured media	301,331	388,055	(22.3)
Unmeasured	157,900	203,400	(22.4)
Total	459,231	591,455	(22.4)
By top brands	**1990**	**1989**	**% chg**
Budweiser beer	184,071	190,836	(3.5)
Michelob beer	38,276	86,592	(55.8)
Busch beer	24,173	39,461	(38.7)
Sea World amusement parks	13,970	10,202	36.9
Busch Gardens amusement park	10,862	10,016	8.5
Anheuser-Busch beers	7,849	14,753	(46.8)
Eagle snacks	7,811	4,516	72.9
O'Doul's Ale	7,244	1,055	586.5

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	11,612	10,284	12.9
Earnings	842	767	9.8
Division sales	**1990**	**1989**	**% chg**
Beer	8,151	7,406	10.1
Food	1,982	1,803	10.0
Entertainment	625	286	118.4

CORPORATE PROFILE

Anheuser-Busch Cos. continues to grow into an even bigger player in the U.S. brewing industry but is looking to other regions and products for growth.

The world's largest brewer in 1990 saw its beer shipments rise 7% to 86 million barrels and its share of the U.S. beer market near 43%. While some of the increase was undoubtedly due to last-minute buying to avoid an alcohol tax increase, A-B continued to gain share in 1991 and claimed 44% of U.S. beer sales at midyear, closer to its stated goal of selling 50% of U.S. beer.

Last year, A-B's sales rose mostly on the strength of Bud Light, Bud Dry and Busch Light. Budweiser, the nation's No. 1 beer with 25.1% of U.S. sales, eroded very slowly and the Michelob brands more quickly. Michelob's problems prompted a review of advertising this summer and the return of the account to D'Arcy Masius Benton & Bowles from DDB Needham Worldwide. A-B is also testing a premium-price Miller Genuine Draft clone called Michelob Golden Draft and Golden Draft Light.

Under Steve Burrows, new VP-marketing, A-B is increasingly relying on a constant supply of new products to keep its drinkers and lure new ones. Its strong share forces A-B to constantly balance growth against cannibalization. The balance seems to have worked for Bud Dry, which in 1990 shipped 1.6 million barrels, more than enough to overcome losses of Budweiser.

A-B cut back on national advertising in favor of local advertising and promotions, though it claims the 12.7% drop in measured advertising overstates the real change.

A-B has looked to Europe for beer expansion, but in the U.S. the big expansion is in snacks. A-B early this year expanded to national advertising for Eagle Snacks chips and nuts. Tortilla chips were added in some markets.

Snack Food magazine estimated A-B had achieved 8.3% growth to $325 million in sales in 1990 for a 5.8% share of the potato chip market.

A-B also moved closer to creating its own bread brand. Iron Kids, a product with many of the health benefits of wheat bread, but with the color of white bread, was expanded into all its 27-state Campbell-Taggart bread territories.

HEADQUARTERS

Anheuser-Busch Cos./One Memorial Dr./St. Louis, Mo. 63102/Phone: (314) 577-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Michael Roarty, exec vp-corp mktg/-

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Corp adv-Hispanic: Sosa, Bromley, Aguilar & Associates, San Antonio, Tex. Al Aguilar, vp-acct mgmt.

Black corp affairs: Caroline Jones Advertising, New York. Gina Ross, vp-acct super.

ANHEUSER-BUSCH INC.: Steve Burrows, vp-brand mgmt; Tony Ponturo, vp-corp media/sports mktg; Jerry Solomon, pres-Busch Media Grp, N.Y.; Tom Sharbaugh, vp-Budweiser; August Busch IV, sr brand mgr-Budweiser; Robert Lachky, sr brand mgr-Bud Light; Manny Flores, sr brand mgr-Bud Dry; William E. Braun, sr brand mgr-Busch family; William Ellis, prod mgr-Busch family; Robert J. Goughenour, grp brand dir-Michelob family; Jim Schumacker, sr brand mgr-Michelob/Michelob Light/Michelob Dark; William Campbell, sr brand mgr-Michelob Dry; Anne Suppiger, brand mgr-Natural Light/O'Doul's; Brian Porter, sr brand mgr-Carlsberg; Al Cummings, brand mgr-King Cobra; Michael Owens, dir-ethnic/geographic mktg.

Bud Light, Bud Dry, Busch brands, Michelob Golden Draft and Golden Light: DDB Needham Worldwide, Chicago. John Greening, sr vp-grp acct dir, beer.

Budweiser, O'Doul's, Michelob, Michelob Light, Michelob Dry, Michelob Classic Dark, Natural Light, Natural Pilsner: D'Arcy Masius Benton & Bowles, St. Louis. James Palumbo, sr vp-acct grp dir.

Carlsberg, Elephant Malt Liquor, Anheuser Marzen: TBWA Advertising, New York. Murray Gaylord, dir-acct svcs.

Anheuser Marzen, new products: TBWA/Kerlick Switzer, St. Louis. Art Gramer, exec vp/dir-acct svcs.

King Cobra: Equinox Advertising, Chicago. Stuart Rankin, Bernie Washington, Bill Daniel, partners.

Budweiser Hispanic: Castor Advertising, New York. Carlos Rodriguez, sr acct exec.

Bud Light Hispanic, Bud Dry Hispanic: Sosa, Bromley, Aguilar & Associates, San Antonio, Texas. Al Aguilar, vp-acct mgmt.

BUSCH ENTERTAINMENT: Melvin L. Bilbo, vp-mktg/prod devel; Barry W. Thigpen, grp mktg dir-Busch Gardens; Christopher M. Shea, grp mktg dir-Sea Worlds; Susan Busch Transou, dir natl adv/prod devel.

Busch Gardens, Sea World of Florida, Sea World of Ohio, Cypress Gardens, Adventure Island, Sesame Place: DDB Needham Worldwide, Chicago. Ray Gillette, sr vp-grp acct dir.

Sea World of California: DMB&B, Los Angeles. Ron Boyd, vp-mgmt super.

Sea World of Texas: GSD&M, Austin, Texas. Steve Braasch, sr vp-acct dir.

CAMPBELL-TAGGART: Larry Pearson, vp-mktg.

Earth Grains breads, Rainbo (Colonial) bread, Iron Kids, Roman Meal, Family Recipe, Country Hearth, Grant's Farm, Break Cake: Bloom Agency, Dallas. Charles J. Calise, sr vp-mgmt super.

EAGLE SNACKS INC.: William Opdyke, exec vp-sales/mktg; Dan R. Keller, vp-mktg.

TBWA Advertising, New York. Rob Rosenthal, sr vp-mgmt super.

ST. LOUIS NATIONAL LEAGUE BASEBALL CLUB: ST. LOUIS CARDINALS: Martie Hendin, vp-mktg; Nancy McElroy, dir-promo.

RANK: 7

AT&T Co.

New York
Ad spending: $796.5 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	64,089	71,083	(9.8)
Sunday magazine	7,348	7,031	4.5
Newspaper	43,753	39,715	10.2
Outdoor	283	283	(0.1)
Network TV	244,910	162,750	50.5
Spot TV	69,013	39,793	73.4
Syndicated TV	19,989	7,044	183.8
Cable TV networks	15,280	6,559	133.0
Network radio	31,197	19,758	57.9
Spot radio	9,571	6,236	53.5
Measured media	505,433	360,251	40.3
Unmeasured	291,100	207,500	40.3
Total	796,533	567,751	40.3
By top brands	**1990**	**1989**	**% chg**
AT&T telephone co	352,027	284,084	23.9
AT&T technologies	45,152	17,526	157.6
Corporate spending	37,898	30,001	26.3
AT&T Universal card	33,344	0	NA
AT&T telephones	19,204	12,625	52.1
AT&T telephone systems	7,362	2,373	210.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	37,285	36,149	3.1
Earnings	2,735	2,697	1.4
Division sales	**1990**	**1989**	**% chg**
Telecommunications	19,691	19,526	0.8
System sales	4,898	4,743	3.3
Telecom networks	7,303	6,782	7.7
Rentals & other svcs	4,631	4,716	(1.8)
Financial svcs & leasing	7621	382	99.5

CORPORATE PROFILE

AT&T Co.'s six-month courtship and eventual buyout of NCR Corp. for $7.4 billion in stock this May signaled its intention to become a major computer marketer and to offer customers worldwide links between computer and telephone networks.

The company also wants to grab a bigger piece of the international long-distance market, an area of fierce competition among AT&T and its rivals, MCI Communications Corp. and US Sprint.

AT&T launched a new TV campaign this May via Young & Rubicam targeting business callers and themed "A world of help." A consumer effort called "Reach out world" has been running for a year.

AT&T also promotes a new foreign-language translation service called Language Line with a print campaign from Wunderman Worldwide that runs in major newspapers.

However, domestic long-distance service remained the core of the company's business. AT&T last year captured a 68% share of total revenues in the estimated $56 billion long-distance telephone market, up from 66.4% the previous year.

MCI's share was about 15%, up from 12.5%, while Sprint captured about 10% of the market, up from 8.3%.

AT&T was the leading media spender in each quarter of 1990 before cutting back in first quarter 1991.

The Universal card has been a success since its launch in late March 1990. It was the No. 6 credit card in the U.S. by mid-1991, opening up 5.2 million accounts (8.5 million cards issued).

Part of its success was attributed to initial features that included waiving permanently the annual fee for customers who signed up in 1990 and used the card to make purchases at least once a year. A 10% discount on long-distance phone calls and 90-day insurance coverage on retail purchases were also offered.

Those features were dropped this March, after they had been extended through the first quarter. Analysts contended the company dropped the features to concentrate on profits.

The residential long-distance market turned into a discount war in early-to-mid-1991 as AT&T's two big rivals introduced new schemes to pull in customers. Sprint restructured its Priority plan by reducing a customer's maximum expenditure from $200 to $20 a month before they could get a 20% discount on off-peak for out-of-state calls. MCI has a plan reducing rates by 20% when the customer calls another MCI user.

In April, AT&T introduced a new discount program called Any-Hour Saver, which offers one hour of domestic calls for $12.

AT&T significantly increased its use of TV in 1990 especially for long-distance service, which pulled $151.3 million in media advertising, up 84%.

HEADQUARTERS

American Telephone & Telegraph Co./550 Madison Ave./New York, N.Y. 10022-3297/Phone: (212) 605-5500.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: J. Kent Planck, corp vp-adv; Robert W. Watson, dir-adv svcs; Pete de Tagyos, Olympics dir; Marj McKean, intl brand mgr; Mary Lou Floyd, adv svcs mgr; Linda Urben, mgr-bdcast media; Mary Ann Thiem, corp adv mgr; Liz Mammen, corp media mgr-print; James Peterson, corp event mktg mgr.

Corporate adv: N W Ayer, New York. Peter Varvara, vp-mgmt super.

Corporate arts & underwriting: Serino Coyne, New York. Linda Lehman, exec vp-acct mgmt.

Black adv, Hispanic adv: UniWorld Group, New York. Herman Morales, sr vp; Linda Dukette, vp-acct super.

AT&T CONSUMER COMMUNICATIONS SERVICES: David Robertson, dir-adv.

Consumer long-distance: N W Ayer, New York. Diane Whitehead, sr vp-mgmt super.

Ethnic adv, Hispanic consumer long distance: Y&R/Bravo, New York. Daisy Esposito, pres-creative dir.

Business services: McCann-Erickson Worldwide, New York. Tom Driscoll, sr vp.

Consumer business, residential, college: Young & Rubicam, New York. Bob Wells, sr vp-grp dir.

Military, college, hospitals: Keyes Martin, Springfield, N.J. Ted Lawrence, acct super.

AT&T CORPORATE INTERNATIONAL: Marj McKean, Intl brand mgr.

AT&T Intl. Corporate adv: Ogilvy & Mather, New York. Cynthia Round, sr vp-grp dir.

Special service long-distance: Young & Rubicam, New York. Peter Hanley, exec vp-worldwide grp dir.

INTERNATIONAL COMMUNICATION SERVICES: Jackie Woodall, div mgr.

Intl. Communication Services-Hispanic adv: Y&R/Bravo, New York. Rossana Pinero, acct exec.

Consumer/business adv-Puerto Rico: Marti Flores Prieto & Wachtel, Puerto Rico.

AT&T CONSUMER PRODUCTS: Richard Tilden, adv/promo dir.

Consumer telephones: N W Ayer, New York. Peter Varvara, vp-mgmt super.

BUSINESS COMMUNICATIONS SERVICES: Susan Munroe, dist mgr.

Domestic business, long distance, Pro WATS, 800: McCann-Erickson Worldwide, New York. Eric Keshin, sr vp-mgmt rep.

Domestic business, long distance, direct marketing: Bronner/Slosberg, Boston. Jean Alexander, vp/assoc.

Domestic business, PBX products: Ogilvy & Mather Direct, New York. Cathy Tweedy, grp dir.

Business Communications Systems: Ogilvy & Mather, New York. Cynthia Round, sr vp-grp dir.

UNIVERSAL CARD SERVICES: Barbara Bromberg, vp-adv/mktg comms, credit card.

Universal Card: Lord, Denstu & Partners, New York. Kathy Moriarty, mgmt super. Chapman Direct, New York. Barbara Jack, sr vp-gm.

GENERAL BUSINESS SYSTEMS: Jon Wiese, dir-mktg.

America's Choice Program: Wunderman Worldwide, New York. Phil Cheevers, mgmt super.

Small Business Systems/Fax: Ogilvy & Mather, New York. Cynthia Round, sr vp-grp dir. Ogilvy & Mather Direct, New York. Cathy Tweedy, grp dir.

CAPITAL CORP.: John Schneider, div mgr-financial svcs.

AT&T Credit Corp.: Carter/Cosgrove, Alexandria, Va. Vicki Williamson, vp.

Capital Corp.: Wordsmith, Chatham, N.J. Don Smith, pres.

DATA SYSTEMS GROUP: Bill Nelson, vp-mktg.

Ogilvy & Mather, New York. Cynthia Round, sr vp-grp dir.

BUSINESS COMMUNICATIONS SYSTEMS: Douglas Ritter, adv dir.

Ogilvy & Mather, New York. Frances Wu, acct exec. Direct marketing: Ogilvy & Mather Direct, New York. Betsy Weiser, vp-mgmt super.

CALL INTERACTIVE: Brian Rivette, vp mktg.

Interactive Voice Services: Wunderman Worldwide, New York. Mark Wunderman, vp-mgmt super.

FEDERAL SYSTEMS: Linda Edgerton, sr mgmt spec.

FCB/Leber Katz Partners, New York. Mike Emerson, sr acct exec.

AT&T MICROELECTRONICS: Mike Neavill, pr dir.

FCB/Leber Katz Partners, New York. John Uusitalo, adv dir.

NEW VENTURES: Roger Greene, adv mgr.

FCB/Leber Katz Partners, New York. Mike Emerson, sr acct exec.

AT&T NETWORK SYSTEMS: Mike Neavill, public relations dir.

FCB/Leber Katz Partners, New York. Tom Carroll, sr vp-mgmt dir.

RANK: 98

Bayer AG

Leverkusen, Germany
Ad spending: $115.3 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	1,693	2,168	(21.9)
Sunday magazine	833	381	118.8
Newspaper	102	326	(68.6)
Outdoor	153	135	13.2
Network TV	32,668	35,245	(7.3)
Spot TV	3,691	6,937	(46.8)
Syndicated TV	9,810	4,163	135.7
Cable TV networks	3,989	4,249	(6.1)
Network radio	14,752	11,563	27.6
Spot radio	132	707	(81.3)
Measured media	67,823	65,873	3.0
Unmeasured	47,500	46,100	3.0
Total	115,323	111,973	3.0
By top brands	**1990**	**1989**	**% chg**
Alka-Seltzer cold products	27,510	22,113	24.4
Alka-Seltzer antacids	18,947	17,234	9.9
Flintstone vitamins	12,359	8,209	50.6

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	25,718	26,740	(3.8)
Earnings	1,274	1,416	(10.0)
U.S.	**1990**	**1989**	**% chg**
Sales	5,904	5,425	8.8
Earnings	149	154	(3.2)
Division sales	**1990**	**1989**	**% chg**
Polymers	4,471	4,390	1.8
Organic prods	3,605	3,738	(3.6)
Industrial prods	5,023	5,694	(11.8)
Healthcare	4,945	4,920	0.5
Agrochemicals	3,221	3,372	(4.5)
Imaging technologies	4,453	4,626	(3.7)

CORPORATE PROFILE

Bayer's U.S. subsidiary Miles increased ad support for its top two brands in 1990 but cut spending sharply for smaller franchises.

An 18.3% increase in measured media for the flagship Alka-Seltzer brand and a 50.6% jump for Flintstones vitamins contributed to overall 3% growth in media spending in 1990, to $115.3 million.

Alka-Seltzer line extensions benefited from increased spending in 1990. Launched in late 1989 and backed with $11.2 million in media in 1990, Advanced Formula Alka-Seltzer continued to receive the majority of the Alka-Seltzer antacid media budget. Alka-Seltzer Plus Sinus Allergy Medicine was rolled out in late 1990 and received $3.2 million in ad support.

Miles' Flintstones leads the $95 million children's chewable segment with a 30% share, said Julie Wolfe, senior analyst with business consultancy Kline & Co.

Miles in May 1991 rolled out Mycelex, the company's first drug to be transferred from prescription to over-the-counter status.

In March 1990 Miles launched S.O.S Juniors steel wool cleaning pads. But instead of adding to the budget, spending for S.O.S oven cleaning pads and S.O.S scouring pads was cut to near zero, and $2 million was spent advertising Juniors.

Miles admits competition hurt the S.O.S division in 1990. Sales of glass cleaners slipped and spending on them was cut 57.5%, to $2.1 million. Miles in mid-1991 began testing S.O.S Kitchen Safe, made from ingredients approved for use in food.

HEADQUARTERS

Bayer USA Inc./One Mellon Center/500 Grant St./Pittsburgh, Pa. 15219-2502/(412) 394-5500.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Elliot S. Schreiber, vp-corp comms; Stephen F. Lee, mgr-corp comms.

MILES INC.-CONSUMER HEALTHCARE DIV: D.B. Bellaire, vp-mktg; T.J. McKinney, vp-sales; M.E. Lawrence, mgr-media svcs.

Corporate media buying: Clifford A. Botway Inc., New York. Clifford A. Botway, chmn.

Miles overseas military, Miles trade adv: Boger, Martin, Fairchild & Co., Elkhart, Ind. Robert M. Boger, pres.

Hispanic adv: Conill Advertising, New York. Bob Reed, vp-client svcs.

Alka-Seltzer, Flavored Alka-Seltzer, Extra Strength Alka-Seltzer, Alka-Seltzer Advanced Formula: McCann-Erickson Worldwide, New York. Rob McKinley, sr vp-grp acct dir.

One-A-Day vitamins, Bactine antiseptic, Bugs Bunny vitamins, Flintstones vitamins: Tatham/RSCG, Chicago. Robert Hielscher, mg partner-cfo.

Alka-Seltzer Plus cold medicines: Wells Rich Greene BDDP, New York. Richard Byrne, exec vp.

MILES INC.-CONSUMER HOUSEHOLD PRODUCTS DIV: J.R. McGrath, vp-mktg; C.C. Culshaw, vp-sales.

S.O.S glass cleaners, S.O.S steel wool soap pads, S.O.S oven pads, Cutter insect repellents, Tuffy scouring aids: in-house.

MILES INC.-DIAGNOSTICS DIV: H.J. Hoffman, vp-mktg, N. America; K.M. Murphy, mgr-mktg comms; J.G. Emgenbroich, comms mgr-bus grp; L.M. Langendonk, comms mgr-N.Y./Technicon.

Diabetes consumer & professional products, Ames brands: Abelson-Taylor, Chicago. Dale Taylor, exec vp.

Clinical hospital products, physician office products, Ames brand: Goble & Associates, Chicago. Ed Goble, pres.

Clinical hospital products, Technicon brands: Harrison Starr, Weiner & Beitler, New York. Tom Harrison, pres.

MILES INC.-PHARMACEUTICAL PRODUCTS DIV: G.B. Rosenberg, sr vp-mktg/sales; J.J. Patchen, dir-prod mgmt; R.J. Lamb, vp-sales.

Cipro: Lavey/Wolff/Swift, New York. Joe Noel, sr vp.

Mezlin: Rolf Werner Rosenthal, New York. Rick Snow, acct super.

MILES INC.-HOLLISTER STIER DIV: G. Horton, dir-sales/mktg; W.G. Bauernschmidt, dir-sales; C. Gurske, dir-prod mgmt.

Allergenic extracts: in-house.

MILES INC.-BIOLOGICAL PRODUCTS DIV: W.G. Johnson, vp-mktg/sales; D. Mahoney, dir-sales.

Alpha I Proteinase Inhibitor: Deltakos, New York. Bob Vogel, acct exec.

Blood bag line: Rainoldi-Kerzner & Radcliff, San Francisco. Jay Kerzner, vp-acct svcs.

Coagulation products: Rolf Werner Rosenthal, New York. Fred Kellogg, acct grp super.

Gamimune N: Carrafiello, Diehl & Associates, New York. Bill Allen, acct exec.

AGFA CORP.: Dionn Tron, vp-corp comm.

AGFA CORP.-PHOTO BUSINESS GROUP: Hans Kuhlman, vp-mktg, consumer/professional; Urs Stampfli, vp-retail; Craig Weatherbee, vp-mktg, Agfa Copal; Rick Noyes, dir-mktg comms.

Agfa photographic film, paper, photochemistry; Agfa and Agfa Copal photoprocessing equipment: McCann-Erickson Worldwide, New York. Steve Poppe, sr acct exec.

AGFA CORP.-ELECTRONIC PREPRESS SYSTEMS DIV: Robert Crevals, vp-intl mktg, OEM sales; Peter Broderick, dir-mktg comms.

Agfa Compugraphic electronic prepress systems, computer graphics: Anderson & Lembke, New York. Laura Donnelly, acct super.

AGFA CORP.-GRAPHIC SYSTEMS BUSINESS GROUP: Christian Aumond, dir-mktg; Peter Broderick, dir-mktg comms.

Agfa Compugraphic electronic and photographic prepress systems: Anderson & Lembke, New York. Laura Donnelly, acct super.

AGFA CORP.-MEDICAL EQUIPMENT DIV: Tom Colucci, dir-mktg comms.

Agfa Matrix electronic and medical imaging products: in-house.

AGFA CORP.-TECHNICAL IMAGING BUSINESS GROUP: Tom Colucci, dir-mktg comms.

Agfa Matrix medical and industrial diagnostic products, micrographics and document systems, Agfa motion picture film: in-house.

HAARMANN & REIMER CORP.: Aroma Chemicals Div: William J. Ludlum, mktg mgr-menthol/aroma chemicals; Gary P. Romens, mktg mgr-sunscreens; Robert E. Zutic, sales mgr. Flavors Div: Jerry T. Murnane, vp-acting dir, mktg; Ken H. Burkhard, dir-sales; James F. Reynolds, dir-Dariteen sales/mktg. Fragrance Div: R.A. Higgins, vp-sales; E.H. Schmidt, dir-mktg. Food Ingredients Div: K.T. Yamashita, vp-sales/mktg.

Aroma Chemicals Div: Menthol, aroma chemicals, sunscreens; Food Ingredients Div: citric acid, sodium citrate, potassium citrate, malic acid, fumaric acid; flavors; fragrances; corporate adv: Slack Brown Communications, Chicago. Cindy Nielson, grp acct dir.

MOBAY CORP.: Richard J. Donati, mgr-industrial adv; N.T. Cullen, vp-mktg, Coatings Div; Dr. Peter-Rolf Mueller, dir-technical mktg, Plastics & Fibers Div; G. Thomas Harrick, vp-mktg, Polyurethane Div; A. Strouken, vp-mktg, Pigments & Ceramics Div; Thomas J. O'Neill, dir-mktg, Pigments & Ceramics Div; Emil Lansu, Herb Klein, vps-mktg, Dyes, Pigments & Organics Div; Dr. G. Poeschel, dir-mktg, Agricultural Chemicals Div; R.K. Miller, mgr-adv, Agricultural Chemicals Div; U. Grabbe, dir-mktg, Animal Health Div.

Corporate: Della Femina, McNamee, Pittsburgh. Jeanne Smith, Casey Crossin, acct supers.

Agricultural Chemicals Div: Herbicides, Insecticides: Valentine-Radford, Kansas City, Mo. Graeme Blasdel, acct grp super.

Animal Health Div: Galen Advertising, Des Moines, Iowa. Galen Lillenthroup, rincipal.

RANK: 84

Bell Atlantic Corp.

Philadelphia
Ad spending: $134.2 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	3,427	2,788	22.9
Sunday magazine	0	33	NA
Newspaper	3,987	4,280	(6.9)
Outdoor	334	444	(24.7)
Network TV	1,785	284	529.0
Spot TV	41,201	38,364	7.4
Cable TV networks	61	18	240.2
Spot radio	6,820	10,433	(34.6)
Measured media	57,614	56,643	1.7
Unmeasured	76,600	75,300	1.7
Total	134,214	131,943	1.7
By top brands	**1990**	**1989**	**% chg**
Bell Atlantic telephone co	13,646	15,892	(14.1)
Bell Atlantic business sys	10,216	407	2,412.4
Corporate spending	7,217	6,594	9.4
New Jersey Bell directories	6,944	6,776	2.5
C&P directories	5,676	5,476	3.6

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	12,298	11,449	7.4
Earnings	1,323	1,075	23.1
Division sales	**1990**	**1989**	**% chg**
Local access	4,617	4,406	4.8
Network access	2,970	2,778	6.9
Toll services	1,544	1,513	2.0
Directory advertising	1,579	1,481	6.6
Other communication	918	649	41.4
Financial, real estate	773	695	11.1

CORPORATE PROFILE

Bell Atlantic Corp. is turning to retail outlets to sell services this year and looking to expand into a much wider range of services following a federal court decision to lift restrictions barring the Baby Bells from owning consumer information services.

Last month, Bell Atlantic began a trial program to sell services, particularly Caller ID and Home Intercom, through Hecht's stores around Baltimore, Washington and Richmond, Va. Previously, Bell Atlantic had relied heavily on advertising to sell special services.

Last year, Bell Atlantic supported its corridor program, better known as Dial 10 NJB. Using the special access code gives dialers a lower rate calling into New York. Guardian, aimed at business users, offers insurance against a breakdown of their phone systems.

Support for Bell Atlantic's Yellow Pages directories was mixed. It spent $5.6 million on the Chesapeake & Potomac Yellow Pages, up 7.7%, and $6.9 million on the New Jersey Bell Yellow Pages, up 2.5%.

In January 1991, VP-Corporate Relations and Advertising Christopher Clouser resigned, later to join Northwest Airlines. His responsibilities were assumed by Philip Campbell, vice chairman-cfo, until March, when A. Gray Collins was named to the post from exec VP-external affairs.

The decision to give the Baby Bells access to information services must survive an appeal, and restrictions remain in effect until an appeal can be heard.

HEADQUARTERS

Bell Atlantic/1717 Arch St./Philadelphia, Pa. 19103/Phone: (215) 963-6000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: A. Gray Collins, exec vp-corp relations/adv; Deanna Hess, asst vp-adv; Roy Weitzell, dir-corp adv; Charles Pacunas, dir-Yellow Pages/large bus adv; Christina Clifton, dir-consumer/small bus adv.

Corporate, products, international: J. Walter Thompson USA, New York. Richard O'Leary, sr vp-mgmt dir.

Bell Atlantic Yellow Pages: FCB/LKP, Philadelphia. Brian Gail, sr vp-grp mgmt super.

Bell Atlantic Direct Marketing: Devon Direct Marketing and Advertising, Malvern, Pa. Ronald Greene, James Perry, mg dirs. J. Walter Thompson Direct, New York. Audrey Himmelstein, vp-mgmt super.

BELL ATLANTIC MOBILE SYSTEMS: Melanie van der Valk, dir adv/corp comms.

W. B. Doner & Co., Baltimore. John Havrilla, vp-mgmt super.

RANK: 24

Bristol-Myers Squibb Co.

New York
Ad spending: $428.7 million

U.S. AD SPENDING ($ in thousands)

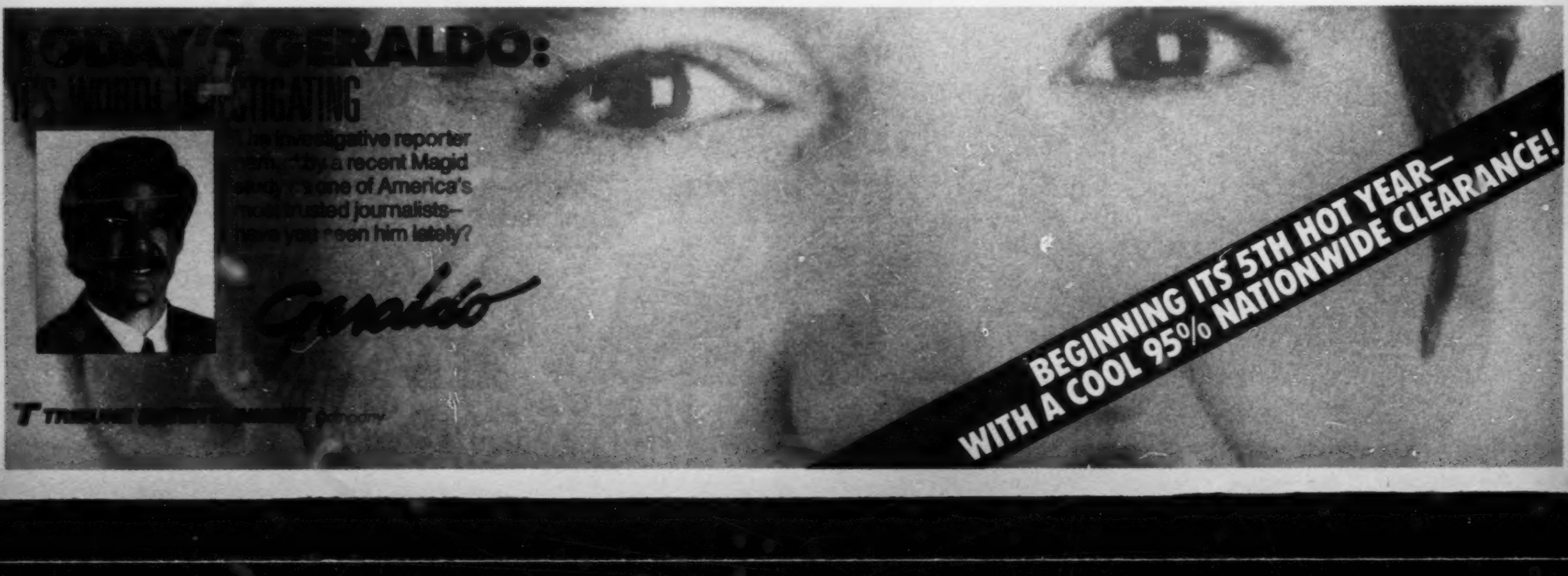
By media	1990	1989	% chg
Magazine	41,956	44,215	(5.1)
Sunday magazine	27	624	(95.6)
Newspaper	66	464	(85.8)
Outdoor	0	228	NA
Network TV	124,363	131,652	(5.5)
Spot TV	9,580	8,058	18.9
Syndicated TV	32,559	34,253	(4.9)
Cable TV networks	10,326	9,852	4.8
Network radio	3,772	4,893	(22.9)
Spot radio	1,110	1,371	(19.0)
Measured media	223,759	235,609	(5.0)
Unmeasured	204,900	215,800	(5.1)
Total	428,659	451,409	(5.0)
By top brands	**1990**	**1989**	**% chg**
Clairol hair coloring prdts	47,246	51,970	(9.1)
Excedrin pain relievers	35,540	26,043	36.5

Total U.S. ad spending by category and media

Category	Year	Total ad spending	Magazine	Sunday magazines	Newspaper	Outdoor	Network TV	Spot TV	Syndicated TV	Cable TV	Network radio	Spot radio
Retail	**1990**	**$6,494.2**	**$249.1**	**$119.7**	**$3,823.1**	**$68.9**	**$356.0**	**$1,499.1**	**$20.6**	**$36.7**	**$101.5**	**$217.6**
	1989	6,170.4	204.6	110.1	3,650.1	72.2	294.8	1,493.7	13.2	30.4	102.9	198.3
Automotive	**1990**	**5,700.7**	**901.2**	**25.5**	**809.2**	**53.0**	**1,790.0**	**1,664.8**	**115.7**	**114.1**	**106.7**	**120.5**
	1989	5,382.7	882.5	29.1	882.1	59.7	1,520.0	1,656.4	64.9	85.9	85.2	117.0
Business, consumer svcs	**1990**	**3,958.5**	**519.1**	**45.0**	**1,320.1**	**64.7**	**698.6**	**861.7**	**56.8**	**100.9**	**114.0**	**177.6**
	1989	3,805.9	525.1	40.3	1,401.7	61.4	624.9	814.5	46.6	96.6	92.8	102.0
Food	**1990**	**3,874.0**	**449.3**	**34.7**	**45.4**	**11.0**	**1,663.5**	**1,025.2**	**351.7**	**124.7**	**75.1**	**93.4**
	1989	3,651.7	437.5	21.6	49.4	10.2	1,661.6	911.8	314.5	103.5	74.5	67.0
Entertainment	**1990**	**3,063.6**	**44.4**	**3.0**	**611.3**	**47.2**	**875.1**	**1,170.8**	**147.2**	**62.3**	**14.8**	**87.5**
	1989	2,778.1	26.0	2.4	518.1	49.8	823.8	1,144.4	76.2	50.8	9.3	77.2
Toiletries & cosmetics	**1990**	**2,333.3**	**675.6**	**27.3**	**5.4**	**2.6**	**1,034.3**	**279.5**	**188.7**	**87.7**	**17.0**	**15.2**
	1989	2,195.0	648.9	32.3	5.9	3.2	921.5	301.3	165.7	82.3	19.7	14.3
Travel, hotels	**1990**	**2,215.9**	**374.5**	**37.9**	**1,048.6**	**49.9**	**203.7**	**324.7**	**10.2**	**37.4**	**42.2**	**86.8**
	1989	2,075.2	366.2	39.7	980.8	50.6	194.0	283.0	5.9	31.9	42.3	80.7
Drugs & remedies	**1990**	**1,690.7**	**160.4**	**17.5**	**118.1**	**13.6**	**787.2**	**320.0**	**133.9**	**60.5**	**53.4**	**26.2**
	1989	1,525.8	133.5	20.3	106.6	12.9	739.0	270.5	117.9	58.7	55.6	10.9
Snacks & soft drinks	**1990**	**1,231.0**	**64.5**	**3.5**	**22.4**	**10.1**	**452.1**	**382.8**	**168.4**	**52.8**	**29.4**	**45.1**
	1989	1,077.8	53.7	3.2	16.4	6.7	408.3	352.2	120.9	47.6	38.2	30.6
Direct response cos.	**1990**	**1,210.5**	**526.4**	**253.5**	**103.2**	**2.2**	**34.5**	**110.5**	**28.5**	**81.9**	**59.5**	**10.3**
	1989	1,155.0	507.5	226.4	106.0	2.7	62.5	125.7	24.6	62.3	31.6	5.6
Apparel, footwear	**1990**	**912.1**	**426.5**	**29.4**	**13.1**	**7.9**	**230.5**	**100.7**	**52.9**	**38.9**	**4.0**	**8.3**
	1989	836.1	391.6	30.3	11.3	7.1	232.2	89.8	27.2	36.4	3.4	6.8
Insurance & real estate	**1990**	**896.2**	**131.0**	**16.1**	**307.1**	**28.4**	**204.1**	**129.3**	**8.9**	**16.6**	**31.3**	**23.5**
	1989	887.5	134.2	19.0	334.1	30.6	193.5	111.5	4.4	15.7	22.4	22.2
Beer & wine	**1990**	**751.5**	**45.5**	**3.5**	**10.3**	**20.0**	**302.1**	**210.4**	**45.2**	**37.0**	**5.0**	**72.4**
	1989	837.5	41.7	2.8	23.0	20.5	380.9	220.6	36.0	38.4	9.2	64.4
Publishing & media	**1990**	**739.8**	**215.5**	**7.9**	**233.0**	**38.6**	**29.4**	**130.2**	**5.8**	**23.6**	**17.8**	**38.0**
	1989	709.8	192.6	4.6	248.3	47.7	11.3	148.1	2.5	18.6	15.2	20.8
Household equip.	**1990**	**661.7**	**117.9**	**13.8**	**25.8**	**1.3**	**260.4**	**146.7**	**40.6**	**27.9**	**18.1**	[illegible]
	1989	630.4	103.0	10.9	22.9	0.7	264.8	130.6	43.7	23.6	21.1	[illegible]
Sporting goods, toys	**1990**	**635.3**	**126.7**	**1.2**	**6.8**	**0.2**	**140.4**	**233.4**	**82.8**	**40.2**	**0.6**	**2.9**
	1989	596.6	130.6	0.7	7.1	0.2	125.9	218.0	81.4	29.6	1.2	1.8
Soaps & cleansers	**1990**	**632.9**	**61.0**	**0.8**	**2.9**	**2.8**	**305.6**	**155.4**	**67.7**	**30.6**	**0.1**	**6.1**
	1989	599.6	67.2	2.1	2.9	2.6	312.4	116.9	67.7	26.1	0.1	1.6
Computers, office equip	**1990**	**604.1**	**285.4**	**5.0**	**71.1**	**3.3**	**152.2**	**28.7**	**7.0**	**19.5**	**20.3**	**11.5**
	1989	647.0	288.9	8.5	92.1	2.4	165.6	42.3	4.9	16.9	13.3	12.1
Cigarettes, tobacco	**1990**	**585.2**	**311.3**	**52.2**	**30.3**	**182.6**	**0.0**	**4.4**	**0.5**	**0.4**	**3.2**	**0.4**
	1989	675.0	401.5	45.7	31.6	187.8	0.2	4.9	0.0	0.7	2.1	0.5
Jewelry, cameras	**1990**	**367.4**	**156.3**	**9.9**	**8.0**	**3.0**	**117.8**	**40.7**	**14.9**	**10.8**	**3.5**	**2.4**
	1989	360.8	153.5	11.4	11.5	1.8	105.5	52.9	11.0	10.0	1.1	2.0
Gasoline & lubricants	**1990**	**343.6**	**39.8**	**1.6**	**24.2**	**6.6**	**39.0**	**169.6**	**1.6**	**8.5**	**1.6**	**51.1**
	1989	308.1	28.6	1.6	25.8	6.1	38.3	164.4	0.6	9.7	4.1	28.8
Building materials	**1990**	**341.4**	**91.1**	**7.4**	**52.3**	**1.6**	**80.6**	**67.8**	**2.4**	**23.0**	**8.0**	**7.2**
	1989	360.7	81.7	7.9	56.2	1.6	92.0	85.2	2.6	18.1	10.8	4.6
Electronic entertainment	**1990**	**339.6**	**89.9**	**4.4**	**13.6**	**1.9**	**82.4**	**74.5**	**14.4**	**35.1**	**18.8**	**4.4**
	1989	336.6	102.5	2.8	12.2	1.8	58.9	85.7	18.0	30.7	17.3	6.6
Liquor	**1990**	**290.8**	**232.2**	**10.3**	**8.4**	**36.5**	**0.0**	**1.3**	**0.0**	**0.0**	**0.0**	**2.0**
	1989	272.8	214.9	11.0	9.0	36.9	0.0	0.4	0.0	0.0	0.0	0.6
Household furnishings	**1990**	**280.9**	**113.8**	**16.3**	**49.7**	**0.9**	**52.1**	**38.6**	**2.3**	**3.6**	**2.5**	**1.1**
	1989	324.4	122.6	23.8	42.6	0.9	69.8	57.2	1.7	2.1	2.3	1.2
Pets, pet foods	**1990**	**213.6**	**28.8**	**3.1**	**7.6**	**0.5**	**104.1**	**38.9**	**15.4**	**10.6**	**2.6**	**2.0**
	1989	273.8	45.8	4.4	4.6	0.3	133.9	40.9	28.4	10.7	4.2	0.6
Horticulture & farming	**1990**	**206.5**	**22.1**	**5.2**	**48.6**	**1.1**	**36.8**	**53.4**	**2.8**	**13.1**	**11.0**	**12.3**
	1989	211.3	24.5	3.2	49.9	0.9	39.0	65.8	5.1	8.2	10.5	4.3
Freight	**1990**	**133.1**	**37.1**	**0.2**	**10.5**	**1.4**	**51.4**	**23.6**	**0.1**	**3.7**	**0.4**	**4.7**
	1989	154.7	47.5	4.6	12.0	0.2	54.7	22.7	0.0	3.2	4.8	4.9
Industrial materials	**1990**	**129.5**	**64.9**	**1.1**	**9.5**	**0.8**	**44.1**	**2.2**	**0.1**	**4.4**	**1.1**	**1.2**
	1989	111.2	62.8	0.7	7.5	0.9	24.0	11.0	0.7	2.0	0.0	1.6
Business propositions	**1990**	**39.1**	**26.4**	**1.4**	**2.5**	**1.0**	**2.3**	**2.8**	**0.0**	**0.4**	**0.4**	**1.9**
	1989	32.4	20.3	0.4	2.4	0.6	3.3	3.6	0.0	0.5	0.9	0.3
Airplanes, aviation	**1990**	**23.0**	**19.3**	**0.1**	**2.4**	**0.1**	**0.2**	**0.4**	**0.0**	**0.1**	**0.3**	**0.2**
	1989	18.2	14.0	0.2	2.7	0.1	0.4	0.3	0.0	0.5	0.0	0.0
Miscellaneous	**1990**	**238.3**	**130.6**	**18.6**	**57.3**	**25.1**	**1.5**	**1.2**	**0.3**	**1.1**	**2.3**	**0.3**
	1989	236.0	139.3	15.2	50.5	24.4	1.8	3.3	0.4	0.8	0.1	0.4
Total	**1990**	**41,138.5**	**6,737.7**	**777.1**	**8,901.9**	**688.8**	**10,132.3**	**9,293.3**	**1,587.6**	**1,110.2**	**766.4**	**1,143.3**
	1989	39,238.0	6,595.0	737.0	8,777.4	705.8	9,559.0	9,029.4	1,286.7	952.5	696.2	898.7

Note: Dollars are in millions. See "Methodology and sources" Page 71 for more information.

AA chart: Kevin Brown



TODAY'S GERALDO:
IT'S WORTH INVESTIGATING

The investigative reporter named by a recent Magid study as one of America's most trusted journalists— have you seen him lately?

Geraldo

BEGINNING ITS 5TH HOT YEAR—
WITH A COOL 95% NATIONWIDE CLEARANCE!

TRIBUNE ENTERTAINMENT Company

U.S. AD SPENDING ($ in thousands)

By top brands	1990	1989	% chg
Nuprin pain reliever	24,062	29,620	(18.8)
Ban deodorants	15,046	14,037	7.2
Bufferin pain relievers	12,330	16,567	(25.6)
Comtrex cold products	11,224	12,397	(9.5)
Renuzit air fresheners	8,961	11,267	(20.5)
Clairol haircare pdts	8,432	13,265	(36.4)
Keri lotion	7,875	5,987	31.5
Mineral Ice gel	7,551	6,534	15.6
Clairol hair pdts for men	6,775	5,017	35.1

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	10,300	9,189	12.1
Earnings	1,748	747	134.0
U.S.	**1990**	**1989**	**% chg**
Sales	7,017	6,478	8.3
Profit	1,747	1,259	38.8
Division sales	**1990**	**1989**	**% chg**
Pharmaceuticals	5,261	4,442	18.4
Non-prescription health prods	1,773	1,662	6.7
Toiletries, beauty aids	1,830	1,858	(1.5)
Medical devices	1,436	1,227	17.0

CORPORATE PROFILE

Bristol-Myers Squibb Co.'s Excedrin headache was a December 1990 U.S. District Court ruling against ad claims that Aspirin Free Excedrin was better than Extra-Strength Tylenol.

Bristol was forced to pull its $10 million effort, replacing it with retro advertising that revived the "Excedrin headache" of the '60s.

The comparative ad campaign, coinciding with a $30 million effort for Nuprin, bespoke of a decidedly more aggressive Bristol.

Bristol this spring introduced Bufferin AF Nite Time, an aspirin-free pain reliever and sleep aid, with ad support of $12 million-plus.

Ad spending shifted significantly for Ban antiperspirants, Bufferin and Excedrin analgesics brands.

Total media spending for Ban brands was up 7.2%, with Ban Solid getting $13.6 million, up 134%.

Support for Ban Spray may have been a casualty of the green revolution; advertising vaporized after the company spent $4.9 million on the brand in 1989.

Overall ad spending for Bufferin dipped 25.6%. Spending for Bufferin tablets was up 164% to $10.3 million; at the same time, ad support for regular Bufferin tablets and capsules was slashed to $1 million from $12.6 million.

Media support for the Clairol line dipped 7% to $66.7 million. Few new products hit the market, exceptions being Lock 'n Roll hair curlers, with $2.6 million in media in its first year, and several new extensions to the Condition hair treatment and styling line. Condition spending was $3.7 million, up 19.4%.

During 1991's first quarter, the toiletries, beauty aids and household cleaners segment was restructured from a regionally run unit to a single global operation to copy operations of other segments. Growth lies outside the segment's mature categories in North America.

Among the segment's leading household products, Drano received a professional-strength extension; the Renuzit air freshener brand got new potpourri scents in 1990, and in early 1991, a Fragrance Jar extension.

Last fall Bristol bought a minority share in Upsa Group, Agen, France, to expand its OTC business in Europe, where Upsa is the No. 2 analgesics marketer. Bristol plans to help develop Upsa's operations internationally.

Bristol has worldwide aspirations for its prescription drugs as well, seeking approval for cholesterol-lowering drug Pravachol in at least 22 countries and developing anti-AIDS drug Videx.

HEADQUARTERS

Bristol-Myers Squibb Co./345 Park Ave./New York, N.Y. 10154/Phone: (212) 546-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Peter J. Spengler, vp-mktg svcs.

N. AMERICAN CONSUMER PRODUCTS GROUP: Peter R. Dolan, sr vp-mktg/sales, Bristol-Myers Prods.; Kenneth Sobaski, vp-mktg, Drackett; Michael A. DeGennaro, sr vp-gm, appliances-Canada, professional & bus devel-Clairol; George Fotiades, sr vp-gm, consumer-Clairol.

Excedrin, Final Net, Loving Care, Nice 'n Easy, Sea Breeze line, Instant Beauty, Clairol trade adv: DDB Needham Worldwide, New York. Rein Luik, exec vp-dir client svcs.

Drano line, Miss Clairol, Ultress, Category Expansion (formerly New User): Grey Advertising, New York. Robert Berenson, exec vp.

Ban Roll-on, Bufferin, Clairol appliances, Comtrex, Vanish line, Behold, Endust, Renuzit Roomates, Renuzit Fragrance Jar, Condition, Mr. Muscle, Keri lotion, Option, Presun, Windex: Laurence, Charles, Free & Lawson, New York. Alfred L. Evans Jr., Frank Macina, Alfred Magnane, exec vps-mgmt supers.

Twinkle, O'Cedar: Fahlgren Martin, Cincinnati. Vincent J. Backley Jr., vice chmn.

Tempra: Goble & Associates, Chicago. Don Overcash, vp-mgmt super.

Nuprin: J. Walter Thompson USA, New York. Alan Coltz, sr vp-mgmt dir.

HEALTH CARE GROUP: Chip Winnebald, vp-mktg, Zimmer; Scott Gillis, vp-gm, BM-Squibb Medical Products Group, Convatec-U.S; John Hamilton, vp-mktg/sales operations, Linvatec; Nancy Caffiero, vp-sales/mktg, urology-Surgitek; A. Richard Zimmerman, vp-sales/mktg, plastic surgery-Surgitek; William B. Williams, sr vp-sales/mktg, Xomed-Treace.

BRISTOL-MYERS SQUIBB U.S. PHARMACEUTICAL GROUP & MEAD JOHNSON NUTRITIONAL GROUP: Gary P. Gibson, vp-gm, Bristol-Myers U.S. Pharmaceutical Div.; Thomas Jordan, vp-mktg, Bristol-Myers Oncology; Thomas Overmyer, Diane Tult, grp prod dirs-Mead Johnson Oncology; Walter Berglund, sr dir-mktg, Westwood-Squibb Pharmaceuticals; Brian Markinson, dir-mktg, Squibb Diagnostics; Nanci Bachman, dir-mktg, Apothecon; John M. Bullock, vp-gm, Mead Johnson Nutritionals U.S.; Rex Mason, vp-mktg, Mead Johnson Enteral Nutritional & Consumer Brands.

Gerber Baby Formula: Grey Advertising, New York. Robert Berenson, exec vp.

Poly-Vi-Sol Flor: Goble & Associates, Chicago. Don Overcash, vp-mgmt super.

Theragran: Saatchi & Saatchi Advertising, New York. Rich Pounder, exec vp.

RANK: 62

Campbell Soup Co.

Camden, N.J.
Ad spending: **$175.3** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	12,202	12,791	(4.6)
Sunday magazine	3,618	1,258	187.7
Newspaper	2,640	3,528	(25.2)
Outdoor	52	698	(92.5)
Network TV	52,048	62,779	(17.1)
Spot TV	17,666	14,773	19.6
Syndicated TV	10,519	11,092	(5.2)
Cable TV networks	4,231	4,365	(3.1)
Network radio	12,536	13,967	(10.2)
Spot radio	1,410	5,957	(76.3)
Measured media	116,923	131,207	(10.9)
Unmeasured	58,400	65,500	(10.8)
Total	175,323	196,707	(10.9)
By top brands	**1990**	**1989**	**% chg**
Campbell soups	53,265	50,785	4.9
Prego sauces	8,927	8,637	3.4
Mrs. Paul's seafoods	8,679	2,993	190.0
Pepperidge Farm cookies	6,949	8,004	(13.2)
V-8 vegetable juice	5,901	11,734	(49.7)
Swanson frozen foods	5,667	5,780	(2.0)
Le Menu frozen dinners	5,555	7,859	(29.3)

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,205	5,672	9.4
Earnings	4	403	(98.9)
U.S.	**1991**	**1990**	**% chg**
Sales	3,933	3,912	0.5
Earnings before taxes	371	633	(41.4)
Division sales	**1991**	**1990**	**% chg**
Campbell N.A.	3,933	3,912	0.5
Campbell Canada	384	352	9.1
Pepperidge Farm	582	569	2.3
International Biscuit	195	219	(11.0)
Campbell International	1,190	1,223	(2.7)

CORPORATE PROFILE

New President-CEO David Johnson stirred the pot at Campbell Soup Co. in 1990, slashing spending in U.S. marketing 5% and ending the company's practice of annually upping the marketing ante by 15%. The idea was to improve the bottom line even at the risk of losing share points.

As a result, Campbell's calendar 1990 media advertising, half of which was spent in the company's fiscal year ended July 31, 1990, was reduced by about $14 million to $116.9 million.

The strategy was short-term. With financial goals essentially met, the company is hiking its domestic ad spending 30% for fiscal 1992 and "returning to brand building."

Part of Campbell's plan to shore up profitability has been to emphasize efficiencies across the board: Headquarters staff was cut by 267 in May 1990, the agency roster was consolidated, the position of category manager was eliminated, more umbrella campaigns were used and fewer products were introduced.

This year, Campbell has abandoned the umbrella approach for advertising individual varieties. While ad spending was flat, condensed soup case volume climbed 4%—compared with flat to declining volumes for several years—behind the new strategy and including new kids' introductions of Souper Stars, Curly Noodle and Teddy Bear soup.

Campbell dominates canned soups with a 76.5% share of the $1.7 billion category, Information Resources Inc.'s InfoScan service reported.

Campbell's frozen foods division pulled two products introduced earlier in the year: lunchtime frozen Souper Combos and Harvest Grain breakfasts. They had introductory budgets of $13 million and $5 million, respectively.

Harvest Grain, which began national distribution in July 1990, was a "healthy" breakfast entree introduced almost simultaneously with rival H.J. Heinz Co.'s Weight Watchers' low-calorie frozen breakfasts. Distribution difficul-

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ties and consumer misunderstanding of the product's name were blamed for poor sales. The company is restaging the line under the name Great Starts Healthy.

Campbell, leader in the $800 million frozen breakfast entree market, in 1990 introduced Great Starts Budget Breakfast and in 1991 launched Big Start, a large breakfast meal.

Campbell's Mrs. Paul's brand, which had been rumored to be headed for the auction block, registered a surprising 40% gain in profits in calendar 1990 attributed to price increases, a 55% hike in ad spending to $8.7 million and value-added positioning.

The recession helped drive up volume at budget-price Swanson by 15%. But the recession hurt Le Menu, which suffered a 20% volume decline in supermarkets in the first quarter of calendar 1991.

Le Menu took a battering from competitor ConAgra's Healthy Choice. In 1990, newly introduced Healthy Choice had a phenomenal 9.7% share of the $3.4 billion overall frozen-dinner/entree market, compared with Le Menu and Le Menu LightStyle's 5.5%.

As a result, Campbell in 1991 recast LightStyle into Le Menu Healthy, a low-fat, low-sodium line.

Spending for V-8 vegetable juice plummeted to $3 million from $11 million. Campbell is trying to revive the brand with a new campaign.

Campbell's weakest link was Pepperidge Farm, normally a star performer with about 6% of the cookie/cracker market, compared with leader Nabisco Biscuit Co.'s 44%. The recession drove consumers away from the pricey lines, and by spring volume had dropped about 8%.

The hemorrhage prompted Pepperidge to drop its original fiscal 1991 ad budget projections by 55% to $8 million and renegotiate compensation with agency Ogilvy & Mather. Campbell spent only $656,000 in media on Pepperidge in the first quarter of calender 1991, down 87%.

Pepperidge Farm President Dick Shea said the unit plans to boost spending in fiscal 1992 "at least 40% to 50%" to about $12 million and that it could go as high as $16 million by yearend, dispelling the need to renegotiate compensation.

The unit is rolling out a line of low-fat cookies this fall called Wholesome Choice, to compete with Nabisco's My Goodness!, testing on the West Coast.

HEADQUARTERS

Campbell Soup Co./Campbell Place/Camden, N.J. 08103-1799/Phone: (609) 342-4800.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: P.N. Mulcahy, vp-adv/pres-CSC Advertising; C.V. McCarthy, pres-Campbell Sales Co.; A.J. Adams, vp-mktg research; D.F. Macaulay, dir-design; G.D. Mahrlig, dir-media svcs; H.P. Pelouze, dir-promo.

SOUP SECTOR: R.F. Bernstock, vp-soup sector; Condensed/cooking soups: D.G. Brewster, bus dir; D.G. Thompson, E. Sung, sr mktg mgrs; T.L. Cruikshank, R. Kitchenoff, mktg mgrs. Ready-to-serve soups: A.D. van Beuren, bus dir; A.L. Wadell, B.G. Walker, M.D. Foster, mktg mgrs. Dry soups: P.M. Gummeson, bus dir; J.M. Davidson, sr mktg mgr; J.A. Rosati, mktg mgr; K.L. Voellinger, assoc mktg mgr.

Red & White, condensed & dry soup: Backer Spielvogel Bates Worldwide, New York. Roberto Calderin, vp-mgmt representative.

Ready-to-serve soup: BBDO Worldwide, New York. Anthony Brescia, sr vp-sr acct dir.

CONVENIENCE FOODS: J.F. Van Stone, sector vp-convenience meals; G.T. Fassak, bus dir-frozen meals; M.G. Smith Jr., mktg mgr-Swanson entrees; A.R. Sakalay, mktg mgr-Hungry Man dinners; J.P. Brennan, mktg mgr-Swanson dinners; D.M. Berkowitz, assoc mktg mgr-Swanson dinnrs; M.S. Kessler, bus dir-premium meals; S.L. Nicholas, mktg mgr, LeMenu; H.M. Kent, mktg mgr-LeMenu Healthy; M. Christ, mktg asst; G.S. Loesch, bus dir-breakfasts; W.J. Tullis, mktg mgr-breakfasts; R.T. Whalen, mktg mgr-new prods; D. Kauffman, grp mktg mgr-poultry/pies; V.A. Melchiorre, mktg mgr-frozen poultry/pies/canned poultry; S.M. Regan, bus dir-seafood; R.J. Davis, R.W. Johnston, mktg mgrs-seafood.

Swanson, Mrs. Paul's: BBDO Worldwide, New York. Anthony Bresica, sr vp-sr acct dir.

Great Starts Breakfasts, LeMenu dinners & entrees: Ogilvy & Mather, New York. Mike Vaughn, sr vp-exec grp dir.

GROCERY DIV: K. MacDonnell, sector vp-grocery; W. Boundy, sr mktg mgr-red juices; H.G. Parker, mktg mgr, V-8; L. Nussman, mktg mgr-tomato juice; T.C. Sager, D. Wong, mktg mgrs-Prego; L. Markshall, assoc mktg mgr-Prego; G.K. Poirier, mktg mgr-gravy/Open Pit barbeque sauce; C.A. Hartmann, sr mktg mgr-beans/pasta; N. Krawczyk, S. Branch, assoc mktg mgrs-pasta; B. Fall, assoc mktg mgr-beans; L. Klein, sr mktg mgr-Marie's; D. Stalker, mktg mgr-Marie's.

Prego spaghetti sauce, new products, V-8, Campbell's tomato juice: FCB/Leber Katz Partners, New York. Bob Hirsch, sr exec vp-dir acct mgmt.

Franco-American pasta, Campbell's beans: CSC Advertising (in-house), Camden, N.J. Paul N. Mulcahy, pres. Bayer Bess Vanderwarker, Chicago. Joanie Rosen, acct exec.

CAMPBELL FOODSERVICE CO.: John Riley, bus dir; E.A. Lynn, sr mktg mgr; T.L. Clemm, mktg mgr; W.J. Caskey, vp-sales; J.A. Blauner, B. McGrory, sr mktg mgrs; K. Patton, assoc mktg mgr.

Rockett, Burkhead & Lewis, Raleigh, N.C. Howard Rockett, chmn.

GODIVA CHOCOLATIER: R. Scheer, grp mktg dir.

Margeotes Fertitta & Weiss, New York. George Fertitta, pres.

VLASIC FOODS: R.W. Shaw, vp-bus planning/devel; D.M. Striegel, vp-foodservice; S.L. Terry, sr dir mktg-pickles; T.F. Last, gm-gravy/sauces; D.A. DeWalt, dir-mktg; L.T. Uhl, mktg research.

W.B. Doner & Co., Southfield, Mich. Richard Friday, sr vp-grp mgmt super.

PEPPERIDGE FARM: R.W. Urbain, vp-gm, biscuit; C.W. Rydin, vp-gm, bakery; P.J. Callaghan, gm-frozen; B.L. Gustaitis, vp-gm, foodservice; D.K. Young, gm-mail order; W.R. Encherman, dir mktg-biscuit; L.M. Kelso, dir mktg-bakery; F.A. Anderson, dir mktg-frozen; C.E. Woodward, dir mktg-foodservice.

Ogilvy & Mather, New York. M. Vaughn, sr vp-exec grp dir.

RANK: 97

Canon Inc.

Tokyo
Ad spending: **$119.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Sunday magazine	32,950	28,622	15.1
Newspaper	1,688	3,645	(53.7)
Outdoor	546	513	6.4
Network TV	25,226	14,815	70.3
Spot TV	2,636	5,735	(54.0)
Syndicated TV	1,166	318	266.3
Cable TV networks	740	1,195	(38.1)
Spot radio	724	0	NA
Measured media	65,676	54,845	19.8
Unmeasured	53,800	44,900	19.8
Total	119,476	99,745	19.8
By top brands	**1990**	**1989**	**% chg**
Canon duplicating equipment	26,547	24,326	9.1
Canon cameras & accessories	21,486	16,655	29.0
Canon video equipment	5,200	2,315	124.4

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	12,800	10,007	27.9
Earnings	455	284	60.2
U.S.	**1990**	**1989**	**% chg**
Sales	3,820	3,058	24.9
Operating income	NA	NA	NA
Division sales	**1990**	**1989**	**% chg**
Copiers	5,082	3,949	28.7
Computer peripherals	2,574	2,030	26.8
Business systems	2,434	2,023	20.3
Cameras	1,856	1,316	41.0
Optical products	854	689	23.9

CORPORATE PROFILE

Canon, in the midst of a five-year "global corporation plan" that includes aggressive worldwide marketing, sharply boosted its U.S. ad spending to help drive up copier and camera sales.

Worldwide, company profits jumped 60.2% last year on a 27.9% rise in sales as the company also boosted global advertising 32.8% to $535.1 million.

In the U.S., Canon USA increased media spending 38.8% to $20 million on cameras, the company's original business. A big portion of the totals backed the launch of the EOS Rebel single lens reflex camera in a campaign featuring tennis player Andre Agassi. The network TV portion for cameras more than doubled to $12.7 million.

The advertising apparently has paid off: Canon believes the $300 EOS Rebel, introduced in September 1990, has become the best-selling quality 35mm camera in the country.

Though lesser spending amounts were involved, Canon also has moved boldly in the camcorder market. Rather than hold its ad fire for the holiday season, Canon has aggressively advertised the compact Canovision 8 camcorder in the spring, reflecting in part Canon's belief that camcorders aren't as seasonal as once considered.

But the approach also has helped win dealer acceptance of the camera early in the year, assuring adequate shelf space for the Canon entry when the heavy holiday buying season does come.

Canon's camcorder marketing included tie-ins with Little League baseball, with the Canovision 8 being designated the "official" Little League camcorder and Canon sponsoring telecasts of the Little League World Series.

According to *Television Digest*, Canon's share of the camcorder market rose a point to 3% in 1990, and its rank rose one position to No. 10.

Copiers are Canon's biggest business, accounting for nearly 40% of worldwide sales. Canon USA's media spending on copier advertising rose 9.1% last year to $26.5 million as Canon claimed about one-fourth of the U.S. copier market, making it category leader nine consecutive years.

In an effort to expand the so-far disappointing size of the color copier market, Canon earlier this year shifted its ad strategy to stress the competitive edge color copies can provide in presentations and reports.

Canon also has launched a new corporate campaign that attempts to unify the look and message of Canon ads. The theme line of the $2 million-plus print campaign is "Your image matters to us."

HEADQUARTERS

Canon USA/One Canon Plaza/Lake Success, N.Y. 11042/Phone: (516) 488-6700.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Hajime Hirai, vp-gm, corp pr.

Canon business machines, camcorders: DCA Advertising, New York. Norman Hajjar, sr vp-dir, client svcs.

Canon cameras: Grey Advertising, New York.

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Jeff Levine, sr vp-grp mgmt super.

Public relations: The Rowland Co., New York. Mark Weiss, sr exec vp.

RANK: 67

Carter Hawley Hale Stores

Los Angeles
Ad spending: **$157.4** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	169	242	(30.2)
Sunday magazine	1,143	463	146.8
Newspaper	72,791	66,859	8.9
Outdoor	10	6	75.4
Spot TV	11,037	10,555	4.6
Spot radio	786	1,341	(41.4)
Measured media	85,936	79,466	8.1
Unmeasured	71,500	66,100	8.2
Total	157,436	145,566	8.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	2,858	2,787	2.5
Earnings	(26)	13	NA

CORPORATE PROFILE

Carter Hawley Hale Stores, overwhelmed by debt, recession and agile competitors, filed for Chapter 11 bankruptcy reorganization in February. But a possible savior, investor Sam Zell, emerged in July for the West Coast's biggest department store chain.

Mr. Zell's Zell/Chilmark Fund, which invests in troubled companies, proposed to invest $290 million in Carter Hawley in return for a controlling stake. Other offers could surface, because by mid-September the committee of creditors had not endorsed the bid, which it felt was too low.

Carter Hawley's problems began in 1987 when it loaded up on debt to fend off a takeover attempt by The Limited. With little money to invest in remodeling, the retailer has been criticized for its tired-looking stores and uninspired merchandising.

Before filing for reorganization, Carter Hawley refocused all its attention on the West Coast. In December 1990, the retailer sold its 26-store Thalhimer Bros. division to May Department Stores Co. for $317 million. Last April, the company merged management of its 12-store Weinstocks division with its 22-store Emporium division; the stores' names didn't change.

Carter Hawley has [illegible] full-line department stores in six Western states. The company has no plans to open other stores.

The stores cater to middle-to-upper-middle-income customers, carrying similar merchandise and many of the same private-label lines. The three divisions oversee their own advertising creative, media and production. Carter Hawley chains all rank first or second in sales in their primary markets.

In calendar 1990, Carter Hawley's media spending returned to 1988 levels. The 1989 figure was depressed mainly from spending cutbacks at Emporium following the October 1989 Bay area earthquake.

HEADQUARTERS

Carter Hawley Hale Stores/444 S. Flower St./Los Angeles, Calif. 90071-2900/Phone: (213) 620-0150.

PERSONNEL, BRANDS, AGENCIES

THE BROADWAY (Southern Calif.): Josephine Lawley, sr vp-mktg/promo.
In-house.

THE BROADWAY (Southwest): Steve Tvert, pres-Thomas/Tvert Advertising; Walter Knowles, div vp-adv dir.
Thomas/Tvert Advertising, Phoenix. Steve Tvert, pres.

EMPORIUM, WEINSTOCKS: Alice McNaughton, sr vp-sales promo; Marsha McLain, div vp-adv.
In-house.

RANK: 21

Chrysler Corp.

Highland Park, Mich.
Ad spending: **$528.4** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	103,492	130,863	(20.9)
Sunday magazine	3,611	8,476	(57.4)
Newspaper	12,002	13,118	(8.5)
Outdoor	958	1,214	(21.1)
Network TV	190,014	140,581	35.2
Spot TV	56,825	51,898	9.5
Syndicated TV	10,872	4,949	119.7
Cable TV networks	9,239	11,858	(22.1)
Network radio	9,994	13,326	(25.0)
Spot radio	15,711	40,254	(61.0)
Measured media	412,717	416,536	(0.9)
Unmeasured	115,700	116,800	(0.9)
Total	528,417	533,336	(0.9)
By top brands	**1990**	**1989**	**% chg**
Chrysler cars	135,837	106,153	28.0
Dodge cars	82,997	80,591	3.0
Jeep vehicles	52,822	45,978	14.9
Dodge trucks & vans	45,142	60,328	(25.2)
Plymouth cars	34,440	40,255	(14.4)
Eagle cars	27,932	31,068	(10.1)
Plymouth trucks & vans	9,468	8,685	9.0
Chrysler Town & Country	7,841	1,349	481.3
Mopar parts & service	7,440	3,033	145.3
Thrifty Rent-A-Car systems	5,742	3,882	47.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	30,620	35,186	(13.0)
Earnings	68	359	(81.1)
U.S.	**1990**	**1989**	**% chg**
Sales	26,867	31,014	(13.3)
Net income	(84)	292	NA
Division sales	**1990**	**1989**	**% chg**
Car & truck	27,009	31,243	(13.6)
Financial svcs	3,774	4,079	(7.5)

CORPORATE PROFILE

A stumbling U.S. economy, broad-based market-share erosion and increasing costs for sales incentives in 1990 through the first half of 1991 at Chrysler Corp. have led some observers to question its long-term viability.

Despite the naysayers, Chrysler defied most analysts' predictions by eking out a profit in 1990—the result of an aggressive cost-reduction program. The No. 3 domestic auto marketer posted a loss of $810 million in the first half of 1991, however, but kept intact its $16.4 billion, five-year development program.

Chrysler reorganized its vehicle development teams last January, creating four teams made up of representatives from marketing, product planning, design, vehicle engineering, manufacturing engineering, procurement and supply, and finance. The system gives team members broad decisionmaking authority in hopes of responding quicker to market forces.

The company is banking on a flurry of key new products in 1992. Early in the year, Jeep will get an all-new sport-utility vehicle dubbed the Grand Cherokee.

Also coming in early 1992 will be the Dodge Viper, a low-volume V-10-powered sports car that will be an important image leader for the company. By fall of 1992, Chrysler will bring out the first midsize sedans from its highly touted LH project.

One factor that's continued to hurt Chrysler is its almost total reliance on the North American market, a highly competitive free-for-all in which more than 40 car and truck brands compete.

Italy's Fiat Auto conducted extensive talks with Chrysler in 1990, with the goal of acquiring a stake in the U.S. auto marketer or at least striking a joint distribution agreement. Talks broke down late in the year, but analysts predict Chrysler will continue to seek a partner for international expansion.

Chrysler's share of the U.S. car market was 9.3% in 1990, down 1.1 percentage points from 1989. The company sold 860,834 cars in the U.S., a decline of 15.6%.

Chrysler also slipped on the truck side, its U.S. share falling 2.4 points to 18.2%. Some of the share loss was attributed to reduced minivan availability because of a production changeover.

It defended its position as the minivan segment leader by backing its Plymouth Voyager, Dodge Caravan and Chrysler Town & Country with $32.3 million in measured media, up 56%.

Chrysler's share of the combined car and truck market in 1990 was 12.2%, a loss of 1.6 percentage points. Unit sales of 1,698,068 represented a 15.3% decline.

The company stabilized its combined car-and-truck market share in first half 1991, coming in at 12.4%, same as the prior-year period. But with industry sales slowed by the recession, Chrysler's unit sales of 767,659 in the first half of 1991 represented a 14.9% falloff from the same period a year earlier.

Chrysler in November announced a $40 million deal with Time Warner that included special single-advertiser issues of *Fortune, People* and *Life*, and a series of insert advertorials, all built around the theme "Rediscover America."

Chrysler bought $106 million in airtime from CBS-TV to sponsor broadcasts of the 1992 and 1994 Winter Olympics and signed on as an official sponsor of the U.S. Olympic Team.

Chairman Lee Iacocca, 66, has announced he will retire as Chrysler's chief executive the end of 1992. The leading candidates within Chrysler to succeed Mr. Iacocca are President Robert Lutz and Vice Chairman Robert Miller, but there are rumors Chrysler's board would consider outside candidates.

HEADQUARTERS

Chrysler Corp./P.O. Box 1919/Detroit, Mich. 48288-1919/Phone: (313) 956-5741.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Theodor Cunningham, exec vp-sales/mktg; John Damoose, vp-mktg; Joseph Cappy, vp-intl operations; A.C. Liebler, vp-comms; Martin Levine, gm-Dodge; Steven Torok, gm-Chrysler/Plymouth; Larry Baker, gm-Jeep/Eagle; Thomas McAlear, dir-mktg operations; James Julow, mgr-adv/media relations; Raymond Dreyfus, media exec-Chrysler/Plymouth/corp; Thomas Peyton, media exec-Jeep/Eagle; Robert Saltsman, media exec-Dodge.

Dodge car & truck: BBDO Worldwide, South-

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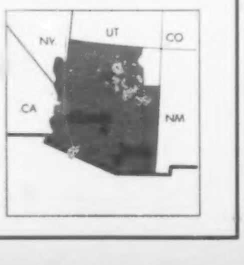

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field, Mich. William Oswald, pres-coo.

Corporate adv, Chrysler/Plymouth: Bozell, New York and Birmingham, Mich. Alan Levenstein, exec vp-strategic planning.

Jeep/Eagle: Campbell-Mithun-Esty, Southfield, Mich. Mike Vogel, pres-coo.

Minority adv: Lockhart & Pettus, New York. Keith Lockhart, pres.

Corporate merch, sales promo & training, Chrysler Credit Corp., Chrysler Fleet Operations, Chrysler Service & Parts Operation, Alfa Romeo: Ross Roy, Bloomfield Hills, Mich. Glen Fortinberry, pres-chmn-ceo, Ross Roy Group; Richard Ward, pres-RR Comms.; Michael Webster, sr vp-mgmt super, Dodge, Chrysler/Plymouth, Jeep/Eagle, dealer mktg; Donald Scheich, sr vp-mgmt super, Chrysler Credit, Services/Parts, Fleet/Lease; Rex Smith, sr vp-mgmt super, intl, training, corp progms; James Vehko, sr vp-mgmt super, Alfa Romeo; Judith Toundas, sr vp-gm, mktg supports svcs; William Abele, sr vp/exec-prod, Ross Roy Productions.

RANK: 69

Circuit City Stores

Richmond, Va.

Ad spending: **$153.0** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Sunday magazine	0	9	NA
Newspaper	41,254	37,599	9.7
Spot TV	50,294	41,072	22.5
Spot radio	250	50	399.3
Measured media	91,797	78,730	16.6
Unmeasured	61,200	52,500	16.6
Total	152,997	131,230	16.6
By top brands	**1990**	**1989**	**% chg**
Circuit City stores	91,797	78,666	16.7

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	2,366	2,097	12.9
Earnings	3	78	(95.9)

CORPORATE PROFILE

The recession wasn't good to the electronics industry, particularly leading electronics specialty chain Circuit City Stores, which experienced a 6% decline in sales from comparable stores in the last half of fiscal 1991.

Circuit City's fiscal year, ended Feb. 28, 1991, saw a 3% decline in same-store sales.

The chain, with 26 stores in the L.A. area, found itself fighting for customers with newcomers Silo and The Good Guys!

Circuit City responded to the softening environment nationwide by cutting inventory and increasing marketing spending, to 6.2% of sales from 6%.

In May 1991, Circuit City took the media buying portion of its account in-house, from J. Walter Thompson USA, leaving JWT to work on creative only.

The No. 1 electronics specialty chain focused on the growth of its Superstore format, opening 34 outlets in fiscal 1991, including new markets Cincinnati and St. Louis. It plans to open 25 more Superstores in fiscal 1992.

Circuit City also is moving into malls with a new format called Impulse—small units with more select merchandise. There are now 14 such stores, up from four in 1990.

Bernie Andrews became exec-VP operations, replacing Bill Rivas who retired. Mr. Andrews, who joined the chain in October 1990, had been president-marketing at Montgomery Ward & Co.

HEADQUARTERS

Circuit City Stores/9950 Mayland Dr./Richmond, Va. 23233-1464/Phone: (804) 527-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE:

Circuit City stores, Circuit City Superstores: J. Walter Thompson USA, New York. Jim Heekin, gm-N.Y. office. In-house adv/media.

RANK: 90

Citicorp

New York

Ad spending: **$124.9** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	9,745	19,144	(49.1)
Sunday magazine	55	0	NA
Newspaper	18,528	18,559	(0.2)
Outdoor	171	81	111.9
Network TV	8,496	20,427	(58.4)
Spot TV	39,709	30,303	31.0
Syndicated TV	0	100	NA
Cable TV networks	2,328	2,156	8.0
Spot radio	9,697	13,129	(26.1)
Measured media	88,730	103,897	(14.6)
Unmeasured	36,200	42,400	(14.6)
Total	124,930	146,297	(14.6)

U.S. AD SPENDING ($ in thousands)

By top brands	1990	1989	% chg
Citibank credit card svcs	45,456	33,823	34.4
Citibank	26,332	14,916	76.5
Citicorp	10,788	33,927	(68.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	14,587	13,752	6.1
Earnings	458	498	(8.0)
U.S.	**1990**	**1989**	**% chg**
Sales	9,056	8,747	3.5
Income before taxes	315	1,531	(79.4)
Division sales	**1990**	**1989**	**% chg**
Interest revenue	30,983	31,576	(1.9)
Fees, commissions, other	7,402	6,394	15.8

CORPORATE PROFILE

Citicorp Chairman John Reed has discovered that being No. 1 isn't always an asset. While Citicorp continues to be the nation's largest bank according to some positive criteria, it also leads the market in one major negative: bad loans.

In 1990, the company wrote off $1.1 billion in delinquent debt. And with no sign of improvement in its loan portfolio, the company is expected to turn in an equally bad performance in 1991.

Citicorp has begun a cost-cutting program that apparently includes ad spending. In 1990, Citicorp reduced its media budget 15%, with most cuts from national media.

However, Citicorp shifted some of those funds into local media and expanded its effort to unify advertising for regional banks and s&l's in eight states.

To point up the difference between its services and those of other banks, Citibank offered its credit card users a "price protection" guarantee, in which it reimbursed customers for the difference between the price they paid and the lowest advertised price for an identical item within 60 days of the purchase.

Citibank this month began a five-month test in Chicago of a program called "Free Gifts" that rewards frequent users of its MasterCard and Visa credit cards by awarding them points for purchases. Points can be redeemed for catalog gifts.

This June Citibank began testing a "secured" MasterCard and Visa credit card, which allows less-credit-worthy users to establish credit by paying an initial $300 into a certificate of deposit account.

The past year was a rocky one for one of Citicorp's agencies. N W Ayer lost the $10 million New York retail bank account to FCB/Leber Katz Partners but kept Citicorp's inactive corporate account and direct marketing duties for Citibank Visa.

HEADQUARTERS

Citicorp/399 Park Ave./New York, N.Y. 10043/ Phone: (212) 559-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Mary Ann Eger, vp-dir, corp adv/mktg svcs; Steve Galasso, vp-dir, bank card comms; Jean Fitzgerald, vp-dir, customer comms-retail branch networks; Lucien Frohling, vp-dir, adv-N.Y. retail bank; Marcia Kublanow, vp-mktg resources, global finance.

Diners Club Card U.S., Citibank Nat'l Mktg Div, Carte Blanche Card, Citicorp traveler's checks: Foote, Cone & Belding Communications, Chicago. Jim Cerasani, sr vp-grp mgmt dir.

Citibank N.Y. retail bank: FCB/Leber Katz Partners, New York. Hal Rossiter, sr vp-grp acct dir.

Diners Club, Diners Club Intl, Citibank N.Y., Citibank Personal Banking, North East Exchange, Bankcard cross-sell: FCB/LKP Integrated Communications Group, New York. Jon Adams, pres.

Citibank Visa & MasterCard, Citicorp POS: Lowe & Partners, New York. Dan O'Donnell, sr vp-mgmt super.

Citibank Visa & MasterCard direct mail: Ayer Direct, New York. Beverly Beaudoin, gm.

Citicorp Select Investments: Masterson Rothberg Advertising, New York. Joan Rothberg, chmn-ceo.

RANK: 63

Clorox Co.

Oakland, Calif.

Ad spending: **$173.4** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	13,920	18,553	(25.0)
Sunday magazine	834	2,008	(58.5)
Newspaper	0	218	NA
Outdoor	36	379	(90.6)
Network TV	58,040	54,480	6.5
Spot TV	32,205	29,749	8.3
Syndicated TV	12,644	11,447	10.5
Cable TV networks	10,759	9,127	17.9
Spot radio	641	2,495	(74.3)
Measured media	129,079	128,457	0.5
Unmeasured	44,300	44,100	0.5
Total	173,379	172,557	0.5
By top brands	**1990**	**1989**	**% chg**
Clorox laundry products	30,497	38,364	(20.5)

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U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Hidden Valley dressings	26,995	21,456	25.8
Liquid-plumr drain opener	14,174	5,584	153.8
Pine-Sol disinfectants	10,479	6,495	61.3
Kingsford charcoal	7,711	9,704	(20.5)
Soft Scrub cleanser	7,441	10,578	(29.7)
Formula 409 cleaner	6,090	4,884	24.7
Tilex tile cleaner	5,639	5,345	5.5
Combat insecticides	5,301	5,493	(3.5)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	1,647	1,484	10.9
Earnings	53	154	(65.7)

CORPORATE PROFILE

Clorox Co. ended its misadventure in laundry detergent in May 1991, saying it would refocus on "basic brands."

Clorox detergent with bleach, introduced in 1988 as an attempt to piggyback on the bleach franchise, fizzled as the company failed to keep up with the maneuvers of Procter & Gamble Co.

Foote, Cone & Belding, Clorox's bleach agency, took over detergent advertising from DDB Needham Worldwide, Chicago, in January 1990. But as detergent titan P&G reshaped the category with superconcentrate powders and Tide With Bleach, Clorox last year slashed detergent ad spending 70% to $2.1 miilion, according to LNA/Arbitron Multi-Media Service.

By early this year, Clorox's detergent market share in the 45% of the nation where the product was sold had slumped to 2.5% from a peak of nearly 6% in 1989, Prudential Securities analyst Andrew Shore estimated.

Admitting defeat, Clorox took a $78.6 million after-tax charge from its fiscal results ended June 30, 1991, to exit the field.

In new products, Clorox went national with Professional Strength Liquid-plumr in March 1990 and with Control cat litter and Clorox Clean-Up, a household liquid cleaner with bleach, in May 1991.

Clorox's most successful recent launch was the March 1990 national rollout of Take Heart salad dressing. Take Heart was backed by $11.1 million in media spending last year.

Take Heart helped boost Clorox's share of the estimated $1 billion salad dressing market to nearly 23% in mid-1991, up from 16% before the launch.

A few of Clorox's brand extensions confound analysts and observers. Its $169 Kingsford Pro Grill, introduced nationally this spring, plays off its top-selling Kingsford charcoal line, but is a curiously high-price item from a marketer of low-price package goods. Also, Hidden Valley frozen entrees entered test in early 1991 with a name associated with salad dressings. Critics say the line is out of touch with the move toward healthier frozen food.

Clorox remains largely a bleach company. Its bleach sales edged up 1.4% in the fiscal year ended June 30, 1991, to $360 million, with bleach contributing 21.9% of company sales and 35%-40% of profits, according to Mr. Shore.

Clorox faces a critical problem with Clorox 2, the dominant color-safe bleach and its No. 2 source of profits. The product is under attack from both detergents with bleach and competition from P&G's Biz and DowBrands' Vivid bleach. Mr. Shore estimated Clorox 2 unit volume dropped 5% in fiscal 1991. Clorox increased media spending on the brand 4% to $16.3 million in 1990.

HEADQUARTERS

Clorox Co./1221 Broadway/Oakland, Calif. 94612/Phone: (415) 271-7000.

PERSONNEL, BRANDS, AGENCIES

Corporate: Will Lynn, Craig Sullivan, grp vps; Don Murray, vp-household prods; Jack Robertson, adv mgr-household prods; A.W. Biebl, vp-Kingsford prods; Larry Peiros, adv mgr-Kingsford prods; Robert Klaus, gm-foodservice prods; K.S. Koelman, dir-mktg, foodservice prods; Peter Louras, vp-intl; R.H. Bolte, dir-media svcs; David L. Goodman, vp-corp affairs; Janet Brady, dir-corp mktg svcs.

Clorox bleach, Clorox 2, Liquid Clorox 2, Clorox Pre-Wash, Clorox Clean-Up, Formula 409, Tackle, Tilex, new products: Foote, Cone & Belding, San Francisco. Kit Mill, grp mgmt super.

Hidden Valley Ranch, Take Heart, Pine-Sol, Control, Fresh Step, Litter Green, K.C. Masterpiece, Brita Water Filter system, new products: Young & Rubicam, San Francisco. Craig Branigan, exec vp-gm.

Liquid-plumr, Soft Scrub, Combat, Kingsford charcoal, Kingsford lighter fluid, Kingsford Pro Grill, BBQ Bag, Match light: DDB Needham Worldwide, Chicago. Colby Kerr, vp-grp acct dir.

Hispanic adv: Clorox bleach, Clorox 2, Clorox Clean-Up, Formula 409, Soft Scrub, Tilex: Fublicidad Siboney, New York. Luis Nasr, exec vp-gm.

Hispanic adv: Hidden Valley Ranch, Combat, Kingsford, Liquid-plumr, Control, Fresh Step, Litter Green: Sosa, Bromley, Aguilar & Associates, San Antonio, Texas. Ernest Bromley, pres.

Hidden Valley Ranch-foodservice, [illegible] [illegible] products-foodservice: Anderson/Rothstein, San Francisco. Kim Rothstein, exec vp.

Institutional/foodservice: Scott Advertising, Milwaukee. Charles E. Reynolds, pres.

RANK: 29

Coca-Cola Co.

Atlanta

Ad spending: **$377.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	7,495	18,139	(58.7)
Sunday magazine	27	701	(96.2)
Newspaper	4,494	4,502	(0.2)
Outdoor	1,998	708	182.2
Network TV	88,906	98,838	(10.0)
Spot TV	75,817	67,380	12.5
Syndicated TV	34,083	18,320	86.0
Cable TV networks	2,914	4,026	(27.6)
Network radio	404	607	(33.5)
Spot radio	8,436	13,874	(39.2)
Measured media	224,573	227,093	(1.1)
Unmeasured	152,600	154,300	(1.1)
Total	377,173	381,393	(1.1)
By top brands	**1990**	**1989**	**% chg**
Coca-Cola beverages	90,441	77,140	17.2
Diet Coke beverage	69,138	60,717	13.9
Sprite beverages	23,399	23,237	0.7
Minute Maid beverage	11,942	10,712	11.5
Diet Sprite beverage	7,625	2,685	184.0
Minute Maid multi-product	6,892	0	NA
Minute Maid juices	6,042	30,876	(80.4)
Hi-C drinks	5,693	5,326	6.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	10,236	8,966	14.2
Earnings	1,382	1,724	(19.8)
U.S.	**1990**	**1989**	**% chg**
Sales	3,931	3,679	6.8
Operating income	440	468	(6.0)
Division sales	**1990**	**1989**	**% chg**
Soft drinks, domestic	2,461	2,222	10.8
Soft drinks, int'l	6,125	4,759	28.7
Foods	1,604	1,583	1.3

CORPORATE PROFILE

Coca-Cola Co. is gearing up to solidify its lead over Pepsi-Cola Co. in the U.S. and abroad, the latter now accounting for 61% of sales and 80% of operating income.

The world's largest soft-drink marketer is preparing its first coordinated worldwide ad campaign for 1992.

Part of that image will be shaped by Coca-Cola's new linkup with Creative Artists Agency, Hollywood's most powerful talent agency, hired in September to work with the company and its agencies to develop "global strategies for marketing, promotion, new technologies, sports, arts and entertainment."

Coca-Cola in July inked a deal with 27 of the 40 U.S. amateur sports federations that will send athletes to the 1992 Olympic Games.

The global initiative combined with the sponsorship of individual sports federations could boost Coca-Cola media spending for soft-drink brands, which has been slowly declining.

Some of Coca-Cola's biggest brands, including Coca-Cola Classic and Diet Coke, were outspent by Pepsi-Cola brands.

Diet Coke was backed with $69.1 million in media (up 13.9%) vs. $76.5 million (up 29.7%) for Diet Pepsi. Coca-Cola Classic got $67.6 million (down 4%), while flagship Pepsi pulled in $73 million

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(down 1.5%).

Case sales for Coca-Cola Classic rose 2.1%, while those of Pepsi rose 0.1%, according to John C. Maxwell Jr., analyst at Wheat, First Securities. Yet both declined in share, Classic sliding to 19.4% from 19.5% of the total market and Pepsi to 17.3% from 17.8%.

Carving away those share points were players in the faster-growing diet segment, which rose in case sales to 29.4% of the total market, up from 27.9% in 1989. Diet Coke remained segment leader by far with a 31% share, aided by a 7.5% growth in sales. Its market share, however, dipped slightly for the first time, by 0.5 percentage points.

Diet Pepsi, No. 2 in the segment, took those share points, rising from a 20.6% share in 1989 to 21% last year as sales increased 11.4%. In the overall market, Diet Pepsi holds a 6.2% share and ranks No. 4, compared with Diet Coke's 9.1% share and No. 3 ranking.

Coca-Cola's corporate soft-drink share grew to 47.6%, reversing a market share decline in 1989 to 47.5% from 47.8% in 1988.

In 1991, criticism of Coca-Cola's creative advertising heightened as management changes were announced at Coca-Cola and its flagship Coca-Cola USA division.

Ira C. Herbert, exec VP at Coca-Cola Co. and president of the North American business, said he would retire at yearend. Mr. Herbert will be replaced by M. Douglas Ivester, senior VP at Coca-Cola and president, Coca-Cola USA.

Theodore J. Host, Coca-Cola USA's senior VP-marketing, resigned Aug. 1 and will be replaced in October by Pierre Ferrari, a senior marketing executive at the Coca-Cola Foods division.

Pulling Mr. Ferrari from Coca-Cola Foods fueled speculation that Coca-Cola would try to sell off its foods division, which posted only a 1.3% sales increase in 1990.

Media advertising for Minute Maid was $24.8 million in 1990, down 40.4%; it lost share points, falling to 22.9% from 23.3% market share for orange juice.

HEADQUARTERS

Coca-Cola Co./P.O. Drawer 1734/Atlanta, Ga. 30301/Phone: (404) 676-2121.

PERSONNEL, BRANDS, AGENCIES

COCA-COLA USA: M. Douglas Ivester, pres, Coca-Cola USA/sr vp, Coca-Cola Co.; John R. Morrison, vp-mktg; Donald B. Lenehan, dir-sugar cola brands; Daniel H. Sayer, mgr-Diet Coke; Christopher J. Gagen, dir-media; Charles E. Morrison, vp, Afro-American/Hispanic programs.

Black adv: Burrell Advertising, Chicago. Tom Burrell, pres.

Hispanic adv: Sosa, Bromley, Aguilar & Assoc., San Antonio. Adolfo Aguilar, vp-acct mgmt.

Sprite, diet Sprite, Mr. PiBB, Fanta domestic, Minute Maid orange soda, Fresca, Mello Yello: Lowe & Partners, New York. Joan Overlock, exec vp-acct mgmt.

Coca-Cola Classic, caffeine-free Coca-Cola Classic, Fanta intl, cherry Coke, diet cherry Coke: McCann-Erickson Worldwide, New York. John Dooner, pres-North America.

Diet Coke, caffeine-free diet Coke: Lintas:New York. Domestic: Steve Norcia, grp exec vp. Intl: Robert Wadsworth, exec vp.

COCA-COLA FOODS: John Weslar, vp-mktg; Richard M. Helmey, sr vp-foodservice.

Minute Maid orange juice: Lowe & Partners, New York. Sammy Smith, sr vp-mgmt super.

Hi-C, Bacardi tropical fruit mixers: Lowe & Partners. Michael D'Souza, vp-mgmt super.

RANK: 44

Colgate-Palmolive Co.

New York

Ad spending: **$265.0 million**

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	6,701	9,324	(28.1)
Sunday magazine	85	179	(52.7)
Newspaper	3,064	1,411	117.2
Outdoor	1,429	2,456	(41.9)
Network TV	38,956	39,196	(0.6)
Spot TV	13,004	16,421	(20.8)
Syndicated TV	9,766	6,477	50.8
Cable TV networks	4,402	2,539	73.3
Network radio	2,651	0	NA
Spot radio	1,910	1,562	22.3
Measured media	81,967	79,568	3.0
Unmeasured	183,000	177,700	3.0
Total	264,967	257,268	3.0
By top brands	**1990**	**1989**	**% chg**
Colgate toothpaste	41,211	36,270	13.6
Palmolive dish detergents	13,290	11,569	14.9
Irish Spring soap	7,200	6,608	9.0
Hills Science pet foods	6,003	4,775	25.7

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	5,691	5,039	12.9
Earnings	321	280	14.6
U.S.	**1990**	**1989**	**% chg**
Sales	1,899	1,828	3.9
Operating profit	209	180	16.0
Division sales	**1990**	**1989**	**% chg**
Hhld, personal care	4,968	4,413	12.6
Specialty marketing	723	625	15.6

CORPORATE PROFILE

Colgate-Palmolive Co. has succeeded in improving profitability in the U.S. despite a continued struggle to prop up its relatively weak market-share positions.

Such a trend will be hard to maintain if it can't stop share erosion and push new hit products onto the market.

Colgate scrapped its centralized ad function—headed by Clay Timon, who left as VP-director of worldwide advertising—and developed a five-year plan calling for a global approach to new products and business development and annual growth in earnings of 15%.

To further that plan, Colgate cut its workforce by 8% earlier this month and eliminated 25 plants. The company said overcapacity had developed from acquisitions in the late '80s, and from the trend toward concentrated formulas in soaps. Consolidation of production will take place in regions like Europe where goods and services will move more freely across borders in 1992, the company said.

Advertising implementation has been turned over to operating executives. So far, Colgate's two major agencies—Young & Rubicam and FCB/Leber Katz Partners—haven't felt any tremors.

This year, Colgate purchased Murphy-Phoenix Co., marketer of Murphy's Oil Soap, which has 6% of the household cleaner market. Colgate's Ajax cleanser holds a 2.5% share of that $1.2 billion market at the manufacturer level. Colgate also has 27% of the $750 million dishwashing liquid market at the manufacturer level, most held by Palmolive dishwashing liquid.

Colgate U.S. media spending has yet to regain its 1988 level. After a 27% drop in 1989 to $79.6 million, media volume rose 3% to $82 million in 1990, according to LNA/Arbitron Multi-Media Service.

The biggest slash in U.S. ad spending was applied to the Fab laundry detergent line, which fell from $8 million in 1989 to less than $1 million in '90. The company has fared poorly in the $3.8 billion detergent market, with its share dropping from more than 8% in 1990 to less than 7% this year.

Lynn Hyman, analyst with First Boston, attributed Colgate's difficulties to slowness to react to the superconcentrated detergent trend and capacity restraints. This year Colgate is repositioning Fresh Start as the "original" superconcentrate. It's also moving Fab Ultra concentrated detergent into 18% of the country.

Colgate achieved efficiencies by promoting in tandem Colgate toothpaste and Fluorigard mouthwash with $7.8 million, up from less than $1 million in 1989.

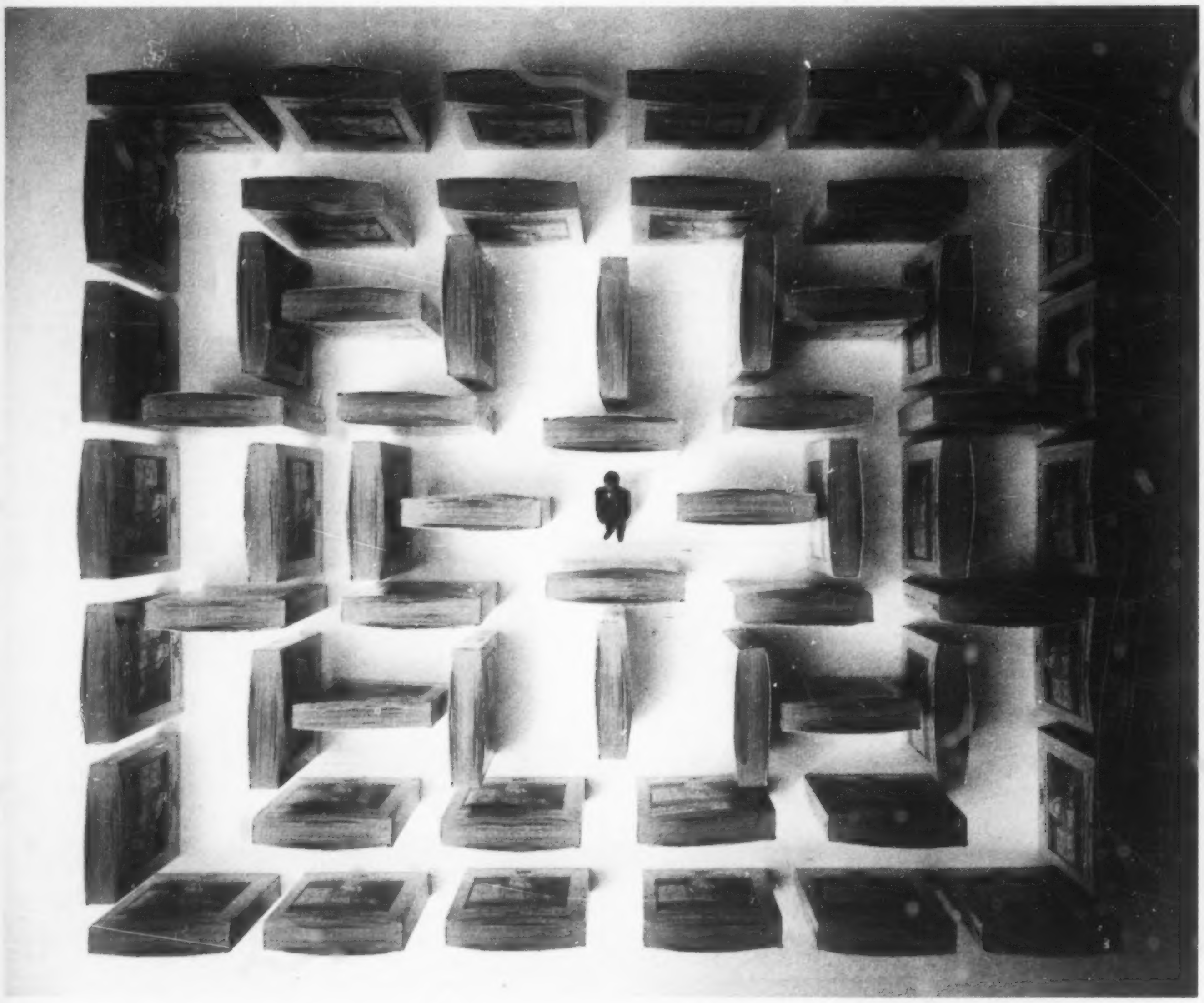
Colgate is awaiting FDA approval for an anti-plaque toothpaste. The product, Colgate Gum Protection Formula, will strengthen the Colgate brand's 26% share of the $1 billion domestic market behind Procter & Gamble Co.'s No. 1 Crest.

HEADQUARTERS

Colgate-Palmolive Co./300 Park Ave./New York, N.Y. 10022/Phone: (212) 310-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Reuben Mark, chmn-pres-ceo; William S. Shanahan, sr exec vp-coo, Roderick L. Turner, sr exec vp-chief of operations/specialty



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mktg. Household and Personal Care: Brian F. Bergin, pres-Colgate, Europe; Lois D. Juliber, pres-Colgate, Far East/Canada; David A. Metzler, pres-Colgate, Latin America; Michael S. Roskothen, exec vp-commercial operations, Colgate-Europe; Edgar J. Field, grp vp-intl bus devel; Craig B. Tate, vp-grp head, global bus devel; Ariel Allen, vp-creative svcs; Thomas G. Davies, vp-fabric care, global bus devel; Javier Garcia Teruel, vp-body care, global bus develop; Kathleen Thornhill, vp-oral care, global bus devel; John Tietjen, vp-household surface care, global bus devel; Douglas R. Wright, vp-environmental affairs. Colgate US: Edward T. Fogarty, pres; Michael L. Hoye, exec vp; Robert E. Blanchard, vp-gm, home care div; Donald R. Kitchen, vp-gm, fabric care; Jane Parker, vp-gm, body care div; Douglas L. Meyer, vp-gm, oral care div; Christian A. Nast, vp-sales; Grace Richardson, vp-consumer affairs; Larry Wilhelm, pres-Softsoap Enterprises; Cyrill R. Siewert, pres, Colgate-Hoyt; Iam M. Cook, pres-Vipont Pharmaceutical; Greg Andrews, gm-market devel; Herney Nisimblatt, mgr-Hispanic mktg.

Colgate dental cream, Colgate Tartar Control toothpaste & mouthwash, Colgate Jr. toothpaste, Irish Spring soap, Irish Spring anti perspirant, Colgate toothbrushes, Fluorigard mouthwash, Colgate shave prep: Young & Rubicam, N.Y. Gerard Dufour, exec vp-ww acct dir; Avi Dan, sr vp-grp dir U.S.

Palmolive dishwashing liquid, Palmolive Automatic liquid for dishwashers, Dynamo detergents, Ajax dishwashing liquid, Fresh Start detergent, Palmolive soap, Ultra Brite toothpaste: FCB/Leber Katz Partners, New York. William J. McDonough, sr vp-intl acct dir; Mel Sokotch, sr vp-U.S.

Hispanic adv: Siboney Advertising, New York. Luis Nasr, gm.

HILL'S PET PRODUCTS: Robert C. Wheeler, pres-ceo; Stephen J. Fogarty, exec vp-mktg/sales; Richard F. Hawkins, pres-intl; James Humphrey, vp-vet mktg; Dr. Larry Hawk, dir-vet mktg; Ted R. Freese, dir-pet mktg; Jan Karnes, grp mktg mgr.

Prescription Diet/Science Diet: Harmon Smith Advertising, Kansas City, Mo. Scott Johnson, vp-client svcs, vet mktg.

Science Diet: Y&R/Wunderman Worldwide, Detroit. Chuck Riley, exec vp-dir client svcs.

PRINCESS HOUSE: Stephen K. Zrike, pres-ceo; William O. Porteous, vp-field sales devel; Elizabeth A. Bowes, vp-incentive mktg.

Princess House home decorative and gifts: Saabye & Co., Providence, R.I. Cathy Ottaviano, exec vp.

COLGATE-PALMOLIVE INSTITUTIONAL PRODUCTS: Kenneth E. Snyder, pres-ceo; Bernard J. Rafferty, vp-sales; Frank Drosselmeier, mktg mgr-soap/dishwashing prods; Gary Clarke, mktg mgr-cleansers/all purpose cleaners/new prods; Edward R. Gagliardi, dir-mktg.

RANK: 46

ConAgra

Omaha

Ad spending: **$246.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	16,303	15,786	3.3
Sunday magazine	1,109	457	142.5
Newspaper	1,722	1,292	33.3
Outdoor	6	108	(94.5)
Network TV	41,823	35,141	19.0
Spot TV	36,353	29,811	21.9
Syndicated TV	4,422	6,750	(34.5)
Cable TV networks	2,910	3,480	(16.4)
Network radio	0	973	NA
Spot radio	5,638	6,193	(9.0)
Measured media	110,286	99,991	10.3
Unmeasured	135,800	123,100	10.3
Total	246,086	223,091	10.3
By top brands	**1990**	**1989**	**% chg**
Healthy Choice frozen meals	25,934	10,227	153.6
Orville Redenbacher	18,125	14,531	24.7
Swift meats	9,302	8,137	14.3
Hunts sauces	9,222	10,792	(14.5)
Wesson oils	8,334	2,996	178.1
Peter Pan peanut butter	8,030	9,235	(13.0)
Country meats	6,805	7,847	(13.3)

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	19,505	15,501	25.8
Earnings	311	232	34.3
Division sales	**1991**	**1990**	**% chg**
Prepared foods	15,048	11,032	36.4
Agri-products	2,444	2,330	4.9
Trading & processing	1,862	1,959	(5.0)
Finance companies	154	180	(14.7)

CORPORATE PROFILE

ConAgra's acquisition of Beatrice Co. seems a very healthy choice.

With the August 1990 purchase of the three remaining Beatrice companies—Hunt-Wesson, Swift-Eckrich and Beatrice Cheese—ConAgra vaulted into the No. 2 spot among U.S. food companies, with sales of $19.5 billion for its fiscal year ended in May. Fully 77%, or $15 billion, of that total is sales of prepared foods, marking the company's growth beyond its commodity-oriented roots.

After combining the successful Swift-Eckrich with its own troubled Armour meats operation to form Armour Swift-Eckrich, ConAgra this fall will introduce Healthy Choice extra-lean ground beef. In a similar setup with Hunt-Wesson, a line of shelf-stable Healthy Choice soups and meals entered test in the fall of '90.

The major product initiative at ConAgra has clearly been the expansion of the Healthy Choice brand—foods with reduced calorie, cholesterol, fat and sodium levels.

The 2-year-old brand, whose sales hit the $329 million mark for ConAgra's fiscal year ended in May, is regarded the most successful new name in the freezer case since Stouffer Foods Corp. introduced Lean Cuisine in 1981. Healthy Choice has about an 11.3% share of the $2.9 billion market for premium frozen dinners and entrees, according to Information Resources Inc.'s InfoScan.

In the freezer case, ConAgra added to its existing Healthy Choice dinner and entree varieties and brought the brand into three new categories—frozen desserts, breakfast muffins and sandwiches, and egg substitutes. Beyond that, ConAgra is testing Snoopy's Choice frozen meals for kids, the line of shelf-stable meals and soups, and the extra-lean ground beef.

ConAgra also boosted its presence in the freezer case with Kid Cuisine dinners, a $75 million franchise that drew $4.4 million in media support during its first full year, and Ultra Slim-Fast frozen dinners, a joint venture with Thompson Medical Co.

ConAgra estimates its corporate share of the entire frozen-food market volume at 28.2%, which includes Healthy Choice, Banquet, Morton, Kid Cuisine, Patio, La Choy, Swift Premium and Chun King.

Hunt-Wesson launched Wesson canola oil, the first national competitor to Procter & Gamble Co.'s Puritan canola oil. Wesson is the largest brand in the $795.6 million market for cooking and salad oils, with a 23% share.

Orville Redenbacher's continued to lead the $428 million microwave popcorn market, which grew 5% last year. Helped by single-serve and Big Bag line extensions, Redenbacher's 40.7% share beat General Mills' Pop Secret's 29%.

Hunt-Wesson drew one-third of its sales from Hunt's tomato products. Although Hunt leads in tomato sauce, Hunt's ketchup trails Heinz 20% to 50%, and Hunt's spaghetti sauce has only 10% of the $1 billion market.

HEADQUARTERS

ConAgra Inc./One ConAgra Dr./Omaha, Neb. 68102/Phone: (402) 595-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: L. James Kennedy, vp-corp dir, mktg.

CONAGRA FROZEN FOODS: Chuck D. Weil, pres; Stephen Hughes, exec vp-nutritional foods; Steve Van Tassel, vp-mktg, Healthy Choice; Thomas Studer, sr vp-mktg/sales, core bus; David D. Lunghino, vp-mktg.

Healthy Choice: Campbell-Mithun-Esty, Minneapolis. Madeline Betsch, exec vp-dir, acct svcs.

Armour frozen foods, Banquet, Chun King, Kid Cuisine, Morton: D'Arcy Masius Benton & Bowles, St. Louis. Richard Spatz, sr vp-acct grp dir.

BEATRICE CHEESE CO.: Robert H. Burns, pres; Jack Hallenbeck, sr vp-mktg/sales.

County Line: William Eisner & Associates, Milwaukee. William Eisner Jr., pres.

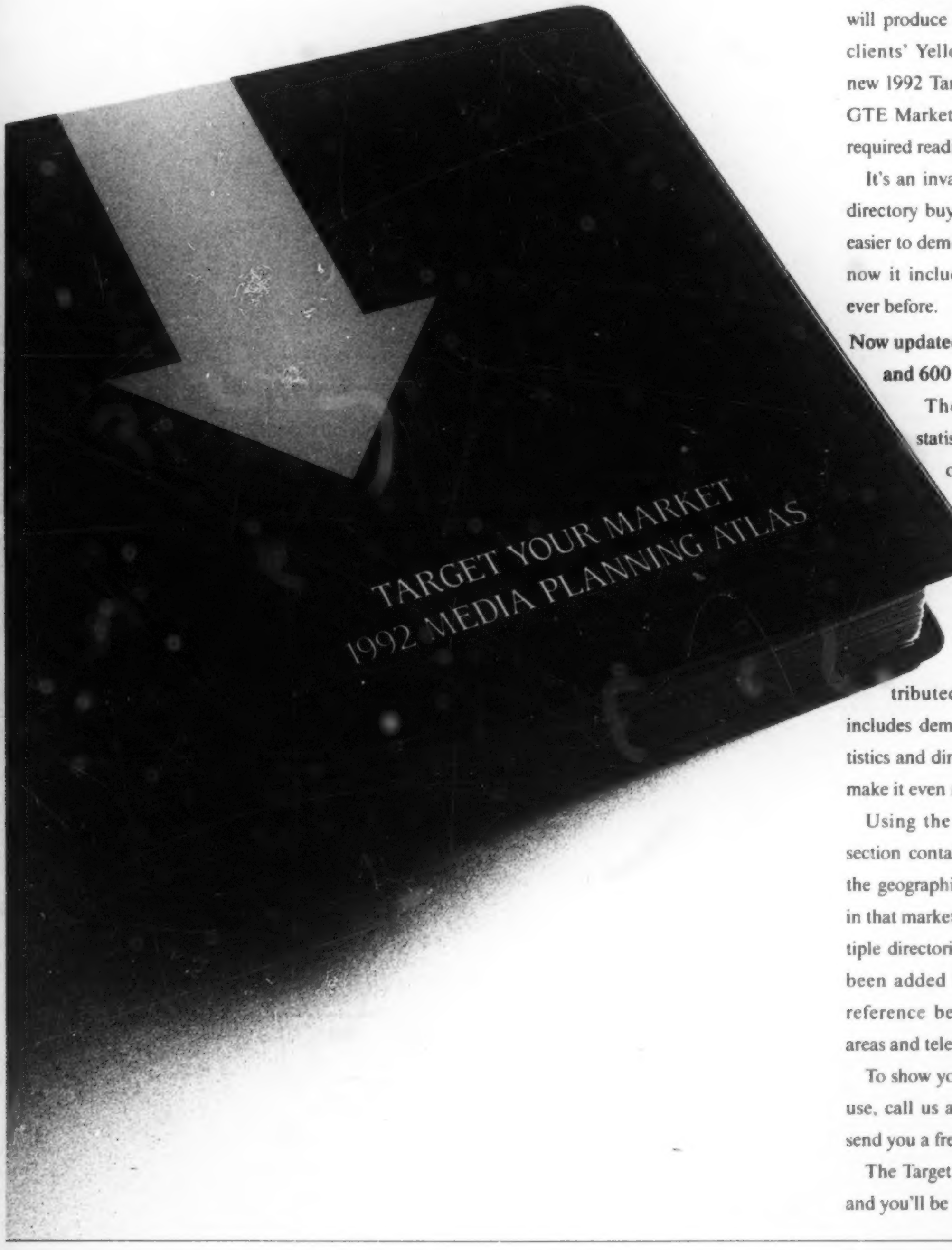
CONAGRA DIRECT MARKETING COS.: Patrick K. Stewart, pres; Roger Waters, vp-mktg, ConAgra Pet Products Co.

Pet products: Smith, Kaplan, Allen & Reynolds, Omaha, Neb. Ronald Kaplan, sr exec vp.

HUNT-WESSON: Albert J. Crosson, pres; Edward A. Snell, vp-mktg.

Hunt's, Wesson, La Choy, Peter Pan, Manwich, Orville Redenbacher's, Rosarita: Ketchum Advertising, San Francisco. John Faville, sr vp-dir, acct svcs.

ARMOUR SWIFT-ECKRICH: John D. Likovich, pres-Armour; Marty Butler, dir-mktg, Armour; Thomas E. Howe, pres-Butterball; Gregg A. Ostrander, pres-Swift Eckrich Prepared Foods; Randy Irion, dir-mktg svcs/research, Swift-Eckrich; Sharon McLenahan, grp mktg mgr-Eckrich; Patrick Riley, dir-mktg, Swift; D. Hall, dir-mktg, Butterball.



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Swift, Eckrich, Butterball: Grey Advertising, New York. C. Jeffrey Stein, exec vp.

Armour: Puskar Gibbon Chapin, Dallas. Jim Gibbon, principal.

CONAGRA POULTRY CO.: George R. Haefner, pres-coo; Larry Hogrefe, vp-dir, mktg.

Country Pride: DDB Needham Worldwide, Chicago. Jack Copher, sr vp-grp acct dir.

GOLDEN VALLEY/LAMB-WESTON: James D. Watkins, pres-coo.

Golden Valley: Martin Williams, Minneapolis. Tom Weyl, pres.

RANK: 53

Adolph Coors Co.

Golden, Colo.
Ad spending: **$194.6** million

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	3,861	3,455	11.7
Sunday magazine	148	324	(54.3)
Newspaper	441	1,455	(69.7)
Outdoor	3,048	3,778	(19.3)
Network TV	37,305	42,893	(13.0)
Spot TV	53,687	48,621	10.4
Syndicated TV	14,581	10,957	33.1
Cable TV networks	2,823	3,513	(19.6)
Spot radio	6,719	12,288	(45.3)
Measured media	122,612	127,284	(3.7)
Unmeasured	72,000	74,800	(3.7)
Total	194,612	202,084	(3.7)
By top brands	**1990**	**1989**	**% chg**
Coors beers	104,463	111,181	(6.0)
Keystone beer	11,841	7,379	60.5

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	1,863	1,764	5.6
Earnings	39	13	196.2
Division sales	**1990**	**1989**	**% chg**
Beer business	1,477	1,366	8.1
Ceramics business	182	167	9.0
Aluminum business	138	167	(17.4)
Packaging business	156	137	13.9
Other	104	104	0.2

CORPORATE PROFILE

Adolph Coors Co., the nation's No. 3 brewer, saw its 9.2% volume gain top the industry in 1990, though such growth has caused capacity problems in its brewing operations. Total volume hit 19.2 million barrels.

Coors Light, which gained 12.4% in volume to nearly 6% of national volume, is now the country's No. 3 beer and may have passed rival Bud Light, with which it was tied for third.

Coors entered the popular-price segment, introducing Keystone, Keystone Light and Keystone Dry with amazing success. But the flagship Coors brand was off 16.5%; Coors Extra Gold also slid.

A new non-alcohol product called Cutter will be rolled out nationally late this month.

Perhaps Coors' biggest advertising move with its existing brands was to cut in half support for Extra Gold (from $22 million) and concentrate its support of the brand in high-volume regions. At the same time, Coors raised support for Coors Light 30% to $68 million in measured media.

Coors made two ad campaign changes as a result of complaints. Coors agreed to stop using the phrase, "It won't slow you down," in Coors Light ads after the Bureau of Alcohol, Tobacco & Firearms got a complaint from a doctor suggesting the line implied beer had no effect on reflexes. The brand switches to "The right beer now" Oct. 1.

Coors also modified its "Brewed from Rocky Mountain spring waters" claim after Anheuser-Busch complained that water from other areas was added in the manufacturing process.

Coors won one battle on the ad front last May, when a judge turned down Eveready Battery Co.'s request that Coors Light's parody of its Energizer bunny campaign be halted.

HEADQUARTERS

Adolph Coors Co./311 10th St./Golden, Colo. 80401/Phone: (303) 279-6565.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Bob Rechholtz, exec vp-mktg; Robert Klugman, vp-brand mktg; Michael Marranzino, vp-devel/intl; Richard E. Franklin, vp-field mktg; Bob McBride, brand dir-Coors Light; Craig Guthrie, brand dir-Keystone/Keystone Light/Keystone Dry; Mark Stankovic, dir-intl mktg; Gary Skovsted, brand mgr-Coors Extra Gold; George Mansfield, mgr-intl/Killian's; Steve Ritter, brand dir-Coors brand; Jon Runge brand mgr-Coors Dry; Karen Thys, brand mgr-Cutter; Dan Bedway, brand mgr-Moussy; Mark Reiss, dir-media/field events.

Coors Light, Coors Extra Gold, Keystone brands, Killian's Red, Rocky Mountain Spring Waters: Foote, Cone & Belding, Chicago. Dan Fox, exec vp-grp acct dir.

Coors brand, Coors Dry, Hispanic mktg: GSD&M, Austin, Texas. Chuck Grady, sr vp-acct dir; Robert Miller, vp-acct dir, Coors Light Hispanic/community relations.

Corporate, community relations/women: Evans/Denver. Charles Bartholomew, chmn-acct super.

Black markets: Uniworld Group, New York. Mark Robinson, vp-grp adv dir.

Cutter: Tatham/RSCG, Chicago. Robert Hielscher, mg partner.

RANK: 80

CPC International

Englewood Cliffs. N.J.
Ad spending: **$137.0** million

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	3,490	11,387	(69.4)
Sunday magazine	0	179	NA
Newspaper	72	39	84.2
Outdoor	58	57	0.7
Network TV	26,283	30,168	(12.9)
Spot TV	18,209	15,828	15.0
Cable TV networks	1,733	2,848	(39.2)
Spot radio	387	264	46.7

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U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Measured media	50,231	60,770	(17.3)
Unmeasured	86,800	105,000	(17.3)
Total	137,031	165,770	(17.3)
By top brands	1990	1989	% chg
[illegible]ns mayonnaise	15,393	19,536	(21.2)
[illegible]s Bakery products	8,607	8,459	1.7
[illegible]y peanut butter	8,415	13,105	(35.8)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	5,781	5,103	13.3
Earnings	374	328	14.0
U.S.	1990	1989	% chg
Sales	2,322	2,260	2.7
Operating income	366	294	24.5
Division sales	1990	1991	% chg
Consumer foods	4,695	4,049	16.0
Corn refining	1,087	1,054	3.1

CORPORATE PROFILE

CPC International endured the recession, aggressive government regulators and the death of a top executive in 1990 to come out with a 14% growth in profits worldwide, although U.S. sales grew a more narrow 2%.

In the U.S., "1991 will not be a bed of roses for [CPC's] Best Foods [Division]. The U.S. recession has severely impacted volumes," said Chairman-CEO Charles Shoemate.

The company dominates the $867 million U.S. mayonnaise and sandwich [illegible]ads market, with a total 35.9% share, according to Information Resources Inc.'s InfoScan service.

The company has promised to build Mazola's position as the leading "health [illegible] Mazola is the No. 3 brand in the $795.6 million cooking and salad oil category, IRI says. It has 2.5% of the $1.4 billion margarine and table spreads category.

But the "health" positioning proved to be an increasingly troublesome one. The FDA pressed for labeling changes for Best Foods Cholesterol Free Reduced Calorie mayonnaise, and also homed in on "light" and cholesterol-reduced claims for margarines and corn oils. Earlier, under pressure from the FTC and state attorneys general, CPC discontinued claims that Mazola helped reduce cholesterol levels.

CPC became a hero of the food industry when it stood up to a false-advertising lawsuit aimed at Mazola ads and their cholesterol claims. The suit was tied to the Racketeer Influenced & Corrupt Organizations Act. A federal judge refused to grant the suit class-action status, and the move helped shatter the RICO threat for national advertisers.

In bread spreads, an improved, creamier Skippy peanut butter was launched in 1990, as well as Roasted Honey Nut Skippy. Skippy is No. 2 in the $848 million peanut butter market, IRI says.

In some cases, brakes were applied to advertising in 1990, and the "health" brands weren't always spared. Mazola corn oil and margarine garnered only $70,000 in measured media, plummeting from nearly $[illegible] million in 1989, according to LNA/Arbitron.

Hellmann's Light, with $8 million in 1989, wasn't advertised in 1990, but Hellmann's Cholesterol Free mayonnaise was up 5.5% to $4.9 million, as the main Hellmann's brand more than doubled to $[illegible].9 million.

On Sept. 11, 1990, CPC Chairman James R. Eiszner lost his battle with cancer. The 63-year-old executive had been with CPC for 27 years.

HEADQUARTERS

CPC International/International Plaza/Englewood Cliffs, N.J. 07632/Phone: (201) 894-4000.

PERSONNEL, BRANDS, AGENCIES

BEST FOODS DIV: Jan A. van Ameronggen, vp-mktg svcs; Stanley M. Hakmiller, vp-sales; Joan S. Dargery, vp-new bus devel; Malcolm Fletcher, vp-mktg; Robert T. Viscardi, media dir.

Hellmann's/Best Foods mayonnaise, Skippy peanut [illegible], Mueller's Super Shapes dry pasta products, [illegible] new products, network TV media buying: BBDO Worldwide, New York. Anthony R. Brescia, sr vp-acct dir.

Thomas' English muffins, Karo syrup, Mazola products, new products, spot TV buying: Backer Spielvogel Bates Worldwide, New York. Alan Kellam, mgmt super.

Hispanic adv-Mazola corn oil: Bravo Group, New York. Daisy Esposito, pres-chief creative officer.

Mazola corn oil-medical profession promo: Medicus Intercon, New York.

Niagara spray starch, new products: Campbell-Mithun-Esty, New York. Charlie Lehman, mgmt super.

Hispanic adv-Hellmann's/Best Foods mayonnaise: [illegible] Advertising, New York. Sue Bittencourt, [illegible]

Arnold Bakery light line, Arnold Bran'nola brand, Brownberry brands: Rotando Lerch & Iafeliece, Stamford, Conn.

CPC FOOD SERVICE: Robert J. Nemec, vp-mktg/ [illegible]

[illegible] SPECIAL PRODUCTS: Lucy Fleming, mktg [illegible]

Knorr soups, Knorr sauces, Knorr liquid sauces, Knorr bouillons: Warwick Baker & Fiore, New York. Andy Mochler, vp-mgmt super.

[illegible] BAKING GROUP: Donald Berman, vp-mgmt.

RANK: 92

Daimler-Benz AG

Stuttgart, Germany
Ad spending: $124.6 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	18,293	17,598	3.9
Sunday magazine	541	115	372.1
Newspaper	21,616	21,415	0.9
Outdoor	163	0	NA
Network TV	30,536	23,573	29.5
Spot TV	12,290	14,301	(14.1)
Cable TV networks	1,655	1,513	9.4
Spot radio	7,284	7,129	2.2
Measured media	92,367	85,643	7.9
Unmeasured	32,200	29,900	7.7
Total	124,567	115,543	7.8
By top brands	1990	1989	% chg
Mercedes-Benz cars	88,334	76,816	15.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	NA	40,705	NA
Earnings	NA	3,628	NA

CORPORATE PROFILE

Performance, and particularly safety features, continued to gain emphasis over style and image as the main themes in Daimler-Benz's marketing efforts supporting Mercedes.

That tack allows Mercedes to stress its "heritage" (of safety engineering) to combat the vigorous competition emerging from the Japanese.

Daimler, which increased its U.S. ad spending by 7.9%, was successful in reversing a four-year decline in Mercedes unit sales in 1990.

Unit sales in the U.S., Mercedes' largest export market, were up 3.5% to 78,375, as market share remained 0.8%.

However, midyear 1991 sales, show considerable erosion, to 33,177, down 22.1% from a year earlier.

The recession is hurting the company's efforts to regain ground, as is a new luxury tax that adds significantly to the price tags of its upper-bracket models.

Mercedes is pinning some of its hopes for a turnaround on a redesigned S Class car, set for introduction to the U.S. next month. In 1990, unit sales for the $50,000-and-up models were 25,627.

Mercedes-Benz of North America underwent a restructuring in 1990, consolidating its seven market zones into four.

HEADQUARTERS

Daimler-Benz AG/BPA/Postfach 80 02 30/D-7000 Stuttgart 80/Germany.

Mercedes-Benz of North America Inc./1 Mercedes Dr./Montvale N.J. 07645-0350/Phone: (201) 573-0600.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Mike Jackson, sr vp-mktg/sales; Albert Weiss, gm-mktg comms; Kenneth Moriarty, gm-strategic mktg/prod mgmt; Kevin Davidson, mgr-adv.

Mercedes-Benz: McCaffery & McCall, New York. Wili Metzger, acct dir.

RANK: 35

Dayton Hudson Corp.

Minneapolis
Ad spending: $318.7 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	2,586	1,998	29.4
Sunday magazine	3,555	4,448	(20.1)
Newspaper	106,158	10[illegible]485	(1.2)
Outdoor	88	191	(53.9)
Network TV	291	114	155.3
Spot TV	48,957	44,198	10.8
Cable TV networks	55	0	NA
Spot radio	5,994	7,911	(24.2)
Measured media	167,685	166,345	0.8
Unmeasured	151,000	149,800	0.8
Total	318,685	316,145	0.8
By top brands	1990	1989	% chg
Mervyns general	21,484	26,884	(20.1)
Mervyns apparel	20,241	13,673	48.0
Marshall Field general	10,877	10,780	0.9
Target apparel	8,706	8,034	8.4
Hudson apparel	7,772	7,172	8.4
Marshall Field apparel	7,684	10,098	(23.9)
Target household	7,649	7,598	0.7
Target sport, toy, hobby	7,547	6,681	13.0
Hudson general	7,252	6,959	4.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	14,739	13,644	8.0
Earnings	410	410	0.0
Division sales	1990	1989	% chg
Target	8,175	7,519	8.7
Mervyn's	4,055	3,858	5.1
Department stores	2,509	1,801	39.3

CORPORATE PROFILE

Dayton Hudson Corp.'s discount- and moderate-price department store business propped up the retailer's financial returns in 1990.

Discount retailers Target and Mervyn's each recorded 4% growth in comparable-store sales, down slightly from the rates a year earlier.

Overall revenue growth of 8% was masked by the partial-year inclusion of Marshall Field's stores, purchased in April 1990. Comparable store revenues actually rose only 3% for all Dayton Hudson stores.

Within the department store division, Field's pushed up sales 41%; same-store sales were flat.

The company's strongest performer remains Target, with 420 discount stores. Target was Dayton Hudson's largest advertiser at $57 million, up 18.7%.

In 1990, Target diverted from its chainwide promotions to concentrate on region-by-region advertising. It launched in Minneapolis last year Target Greatland superstore. The launch was followed by an aggressive media campaign with the theme "Sometimes you need a bigger target."

Mervyn's, a moderate-price department store chain of 420 stores, recently started upgrading its private label stock, which accounts for 50% of sales.

Each Dayton Hudson store division handles production and placement of advertising through its own in-house agency.

Hudson's outspent Dayton's with $21.8 million in media, same as in 1989, to Dayton's $12.7 million, up 21%. Field's pared its advertising 14.7% to $27.9 million.

HEADQUARTERS

Dayton Hudson Corp./777 Nicollet Mall/Minneapolis, Minn. 55402/Phone: (612) 370-6948.

PERSONNEL, BRANDS, AGENCIES

DAYTON HUDSON DEPARTMENT STORE CO.: Stewart Widdess, sr vp-mtkg; Paul Karmann, dir-media planning; Jack Mugan, dir-creative svcs; Karen Bohn[illegible], vp-trend merch/special events.

Dayton's, Hudson's, Marshall Field & Co.: Pidgin Productions, Minneapolis. Gary Jensen, pres.

Corporate media buying: Haworth Group, Minneapolis. Dale Haworth, pres.

MERVYN'S: Susan Sprunk, vp-sales promo; Pat Holt, dir-adv; Ruth Lindley, dir-consumer research/media; Brad Davis, dir-operations/bus planning.

Cohen & Johnson, Los Angeles. Howie Cohen, chmn-creative dir; Mark Johnson, pres.

TARGET STORES: John Pellegrene, sr vp-mtkg; Robert Thacker, vp-mktg.

Chuck Ruhr Advertising, Minneapolis. Chuck Ruhr, pres.

RANK: 89

Delta Air Lines

Atlanta
Ad spending: $126.5 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	7,338	3,125	134.8
Sunday magazine	349	12	2,906.0
Newspaper	32,898	28,471	15.5
Outdoor	1,834	1,659	10.5
Network TV	29,510	29,295	0.7
Spot TV	10,068	4,126	144.0
Syndicated TV	45	[illegible]17	172.7
Cable TV networks	1,848	[illegible]	(6.4)
Spot radio	10,988	[illegible]	(39.9)
Measured media	94,878	86,959	9.1
Unmeasured	31,600	29,000	9.0
Total	[illegible]6,478	115,959	9.1
By top brands	1990	1989	% chg
Delta Air Lines	94,777	[illegible]9,008	20.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	NA	[illegible]	NA
Earnings	NA	[illegible]	NA
Division sales	1990	1989	% chg
Passenger	NA	[illegible]2	NA
Cargo	NA	[illegible]	NA
Other	NA	124	[illegible]

CORPORATE PROFILE

Delta Air Lines, poised to become a major international carrier after its acquisition of Pan American Airways' international routes, is priming to take over the market share lead in the volatile airline business.

The purchase includes Pan Am's North Atlantic routes, Frankfurt hub and Pan Am Shuttle. Department of Transportation approval is expected this fall. The carrier is planning hefty ad spending to achieve a global positioning.

Among the nation's top 13 carriers, Delta has shown the greatest share growth for the first seven months of 1991—even without the benefit of the Pan Am deal, according to figures from PaineWebber. Delta had a 15.2% share this year through July, compared with 13.2% in the same period last year.

In March, Delta began a Business Saver fare program that offered 20% discounts for flights booked three days in advance. By fall, however, Delta and other carriers had returned to the seven-day advance purchase requirement.

HEADQUARTERS

Delta Air Lines/Hartsfield Intl. Airport/Atlanta, Ga. 30320/Phone: (404) 765-2600.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Al H. Kolakowski, sr vp-mktg; R.W. (Bob) Coggin, vp-mktg devel; Russ Gariota, vp-sales; Harold Achtziger, vp-intl; Marcey McCann, vp-reservations sales; Judy Jordan, asst vp-adv/sales promo; Matt Guilfoyle, dir-consumer mktg; Harry Dunham, dir-industry mktg; Skip Barnett, dir-field mktg; Sandy Rowan, mgr-adv; Don Nabity, staff mgr-adv/promo; Kathy Field, mgr-intl adv; Jon Proctor, system mgr-promo.

Delta Air Lines: BBDO Worldwide, Atlanta. Jack Walz, exec vp-worldwide acct dir.

Delta Shuttle: Della Femina, McNamee, New York. Ann Milne, mgmt super.

RANK: 23

Walt Disney Co.

Burbank, Calif.
Ad spending: $43[illegible] million

U.S. AD SPENDING ($ in thousands)

By media	1990	[illegible]	% chg
Magazine	17,752	[illegible]2,654	(21.6)
Sunday magazine	613	16	3,805.1
Newspaper	36,726	24,628	49.1
Outdoor	688	220	212.4
Network TV	62,919	43,239	45.5
Spot TV	86,240	66,780	29.1
Syndicated TV	14,595	9,144	59.6
Cable TV networks	4,211	3,043	38.3
Network radio	1,057	275	285.1
Spot radio	4,433	8,035	(44.8)
Measured media	229,233	178,033	28.8
Unmeasured	206,500	160,400	28.7
Total	435,733	338,433	28.7
By top brands	1990	1989	% chg
Touchstone Films	80,060	58,839	36.1
Walt Disney World resort	45,740	47,546	(3.8)
Walt Disney movies	25,374	18,448	37.5
Hollywood Pictures	20,744	0	NA
Disneyland amusement park	18,648	14,816	25.9
Walt Disney home video	14,273	6,050	135.9
Touchstone home video	5,874	7,053	(16.7)
Disney Channel cable TV	5,296	5,020	5.5

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	5,844	4,594	27.2
Earnings	824	703	17.2
Division sales	1990	1989	% chg
Theme parks, resorts	3,020	2,595	16.4
Filmed entertainment	2,250	1,588	41.7
Consumer products	574	411	39.6

CORPORATE PROFILE

Walt Disney Co.'s self-proclaimed "Disney Decade" is getting off to a rocky start, with earnings for the first three quarters of fiscal 1991 down 22% due to the recession's effect on theme park attendance and several box-office flops. Fiscal '91 ends Sept. 30.

Operating income for Disney's theme parks and resorts declined 31% during the period, despite the opening of a new attraction, Disney-MGM Studios' "Kermit the Frog Presents: Muppetvision 3-D."

After winning the box-office market share derby in 1990, Disney dropped to third place through Labor Day 1991, with a string of flops that included "One Good Cop," "Run," "The Marrying Man," and "V.I. Warshawski."

Walt Disney Studios Chairman Jeffrey Katzenberg in January sent a 28-page internal memo to Disney executives, which was widely circulated in Hollywood, eschewing high-price blockbusters and calling for low-key, well-thought-out marketing plans.

His resolve was surely strengthened by the box-office failure of Disney's "The Rocketeer." The film cost $35 million to produce and $15 million to market but made only $45 million at theaters.

Disney grabbed its 16% market share in 1990 by increasing media spending 53.2% to $130 million.

Disney hopes to ensure exposure for its fall 1991 films with an unusual "Ticket to Entertainment" promotion linking four of its films to Coca-Cola Co.'s soft drinks.

Burger King Corp. replaced McDonald's Corp. as a fast-food promotional partner this year on promotions tied to its holiday film, "Beauty and the Beast," and the 20th anniversary of Walt Disney World.

Home video has been a bright spot for Disney, with the videocassette release of "The Little Mermaid" selling more than 8 million copies. Media spending behind the company's Buena Vista Home Video rose 54.5% to $20.2 million and will increase more than fivefold this year.

Disney, under its consumer products division, established a general-interest book publishing unit. This summer Disney acquired *Discover* magazine from Family Media.

HEADQUARTERS

Walt Disney Co./500 S. Buena Vista St./Burbank, Calif. 91521/Phone: (818) 560-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE:

Media buying: Buena Vista Pictures Marketing, Buena Vista Television, Buena Vista Home Video, Walt Disney Attractions, The Disney Channel: Western International Media, Los Angeles. Dennis Holt, pres.

BUENA VISTA PICTURES (feature films): Bob Levin, pres-worldwide mktg; Robert Jahn, sr vp-creative svcs; Bobbi Blair, sr vp-media.

BUENA VISTA TELEVISION: Carole Black, sr vp-mktg; Rick Haskins, vp-mktg.

BUENA VISTA HOME VIDEO: Ann Daly, sr vp-mktg.

DDB Needham Worldwide, Chicago. Vicki Mondae, grp acct dir.

THE DISNEY CHANNEL: Tom Wszalek, sr vp-consumer mktg.

Rubin Postaer & Associates, Los Angeles. Tom Kirk, sr vp-grp acct dir.

DISNEY CONSUMER PRODUCTS: Barton K. Boyd, pres; Charles P. Wickham, grp vp-Disney Publishing; John Skipper, vp-magazine publishing.

Janklow Bender, New York. Maggie Trujillo, acct exec.

WALT DISNEY ATTRACTIONS: Tom Elrod, sr vp-mktg.

RANK: 76

Dow Chemical Co.

Midland, Mich.
Ad spending: $141.9 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	20,443	19,459	5.1
Sunday magazine	6,975	3,994	74.6
Newspaper	284	112	154.8
Outdoor	42	41	1.7
Network TV	64,644	75,466	(14.3)
Spot TV	2,706	7,773	(65.2)
Syndicated TV	2,260	6,187	(63.5)
Cable TV networks	6,630	7,925	(16.3)
Network radio	566	2,619	(78.4)
Spot radio	1,053	1,524	(30.9)
Measured media	105,604	125,100	(15.6)
Unmeasured	36,300	43,000	(15.6)
Total	141,904	168,100	(15.6)
By top brands	1990	1989	% chg
Ziploc food storage bags	15,668	18,887	(17.0)
Dow Chemical Co.	14,112	9,989	41.3
Texize cleaning products	11,861	12,502	(5.1)
Seldane allergy medication	11,053	0	NA
Spiffits cleansing towels	9,513	19,272	(50.6)
Nicorette nicotine gum	9,507	155	6,049.2
Freezloc wrap	6,789	5,662	19.9
Fantastik cleaner	6,722	1,842	264.9
Perma Soft haircare pdts	5,767	5,104	13.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	19,773	17,600	12.3
Earnings	1,378	2,486	(44.6)
U.S.	1990	1989	% chg
Sales	9,494	8,084	17.4
Operating income	1,622	1,876	(13.5)
Division sales	1990	1989	% chg
Chemicals performance products	5,088	5,407	(5.9)
Plastics	7,392	6,994	5.7
Hydrocarbons	2,210	1,778	24.3
Consumer specialties	5,053	3,407	48.3

CORPORATE PROFILE

Dow Chemical Co. kept expanding into consumer markets in 1990, evidenced by the growth in its consumer specialties division. The operations of Dow's two joint ventures formed in 1989—pharmaceutical arm Marion Merrell Dow and agrichemical unit DowElanco—are almost completely consolidated with the consumer division.

The resulting expanded consumer specialties division—agricultural products, pharmaceuticals and DowBrands consumer products—jumped 50% in sales. The division is largely the reason Dow Chemical turned in a 12% growth in sales.

Dow had forecast a decline in profits for 1990 from the all-time record highs of 1988 and 1989 but hadn't expected the magnitude of the downturn, according to President Frank P. Popoff.

Dow expects growth in the specialized products to offset the continued decline in other areas of its business, largely basic chemicals.

Saddled with heavy debt and big capital expenditure plans in 1990, Dow Chemical cut its advertising media expenditures 15.6%.

The biggest budget cuts took place at DowBrands, the consumer product segment of the consumer specialties division, where sales dropped 3.3% to $934 million. Ad spending for Spiffits cleaning towels, launched in [illegible]9, was cut by 50.6%.

Some of that [illegible] may have gone to Fantastik S[illegible] multipurpose towel rolled out in [illegible] with $4.9 million in support.

Media advertising declined 17% for Ziploc food storage bags.

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From the newly merged pharmaceutical side, brand advertising of Seldane non-sedating allergy medication first appeared in consumer media in 1990.

Nicorette nicotine gum, another prescription drug, drew $9.5 million in media advertising in 1990, compared with virtually no advertising by name the previous year.

In July 1991, DowBrands dropped Della Femina, McNamee and consolidated accounts for both foodcare and cleaning products at Campbell-Mithun-Esty.

HEADQUARTERS

Dow Chemical Co./2030 Willard H. Dow Center/Midland, Mich. 48674/Phone: (517) 636-1000.

PERSONNEL, BRANDS, AGENCIES

DOW CHEMICAL USA: William S. Stavropoulos, pres; Thomas K. Smith, vp-govt/public affairs; Robert W. Charlton, dir-corp comms; Richard F. Dalton, mgr-corp adv.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. H.J. Hogan, sr vp-mgmt super.

CHEMICALS & PERFORMANCE PRODUCTS: John W. Tysse, vp-sales/mktg.

Chemicals & metals: Hoffman, York & Compton, Milwaukee. John Murphy, sr vp-acct grp super.

Public relations: chemicals & metals, performance products, latex products: Gibbs & Soell, New York. Cos Mallozzi, pres.

Latex products: Weller, Cook & Misamore Advertising, Grand Rapids, Mich. Robert Cook, vp.

Performance products, separation systems, new ventures: Alexander Marketing Services, Grand Rapids Mich. Robert Milroy, pres-acct grp super.

DOW PLASTICS: Richard E. Sosville, vp-sales/mktg.

Dow Plastics products: Anderson & Lembke, Stamford, Conn. Mike Romans, vp-client bus mgr. Alexander Marketing Services, Grand Rapids, Mich. Robert Milroy, pres. Jayme Organization, Cleveland. Mike Paulus, acct exec.

Dow Plastics products & public relations adv: Sefton Associates, Grand Rapids, Mich. Gary Petertyl, sr vp.

Public relations adv: Gibbs & S[illegible], Chicago. Cos Mallozzi, pres. Proconsul, Cleveland. Judy [illegible]enninger, acct. exec.

DOW BRANDS: Household Prods Div.: Lee Schobe, pres-ceo; Jim Bernhardt, vp-mktg; Ann Bastianelli, dir-adv.

Foodcare products: Campbell-Mithun-Esty, Minneapolis. Richard Rosengren, sr vp-mgmt super.

Cleaning products: Henderson Advertising, Greenville, S.C. Mark Klein, vp-mgmt super.

Personal care products: Campbell-Mithun-Esty, Minneapolis. Richard Rosengren, sr vp-mgmt super.

MARION MERRELL DOW-Consumer Products Div.: George Quesnelle, dir-mktg; Gregory Westerbeck, adv dir.

Cepacol, Citrucel, Gaviscon, [illegible]: Rubin, Reed, Noto & Ehrenthal, New York. Herb Ehrenthal, acct super.

DOW ELANCO AGRICULTURAL PRODUCTS: Frank Moore, mgr-mktg [illegible]omms; E.N. German, mgr-mktg sales support; Bill Culpepper, commercial dir.

Stinger, Curtail, Tordon, professional pest control, vegetation management, retail turf, ornamental business: Bader Rutter & Associates, Milwaukee. Miller Hogan, vp-acct super.

Lorsban, Treflan, Sonalan, [illegible], Stinger (corn), Lontrel, Tordon, Curtail, Surflan, Telone, [illegible], Rubigan: Creswell, Munsell, Fultz & Zirbel, Cedar Rapids, Iowa. M. White, sr vp-mgmt super.

Professional turf & ornamental business: Carmichael Lynch, Kansas City, Mo. Jeff Morris, acct exec.

PRESCRIPTION PRODUCTS DIV: John R. Julian, vp-mktg.

RANK: 11

Eastman Kodak Co.

Rochester, N.Y.

Ad spending: **$664.8 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	44,307	45,685	(3.0)
Sunday magazine	4,627	3,916	18.1
Newspaper	739	1,059	(30.2)
Outdoor	1,825	429	325.4
Network TV	116,523	137,517	(15.3)
Spot TV	13,364	14,734	(9.3)
Syndicated TV	21,651	13,700	58.0
Cable TV networks	12,589	10,642	18.3
Network radio	1,320	6,798	(80.6)
Spot radio	1,253	1,499	(16.4)
Measured media	218,197	235,978	(7.5)
Unmeasured	446,600	483,000	(7.5)
Total	664,797	718,978	(7.5)
By top brands	**1990**	**1989**	**% chg**
Kodak cameras & accessories	70,345	72,324	(2.7)
Bayer aspirin	17,325	25,180	(31.2)
Lysol disinfectants	15,655	18,788	(16.7)
Lysol bathroom cleaners	15,434	8,751	76.4
Thompson coatings	11,264	11,279	(0.1)
Phillips Milk of Magnesia	7,042	6,492	8.5
Lysol cleaners	6,899	6,099	13.1
Corporate spending	5,734	4,904	16.9
Minwax wood finishes	5,197	5,747	(9.6)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	18,9[illegible]	18,398	2.8
Earnings	703	529	32.9
U.S.	**1990**	**1989**	**% chg**
Sales	20,229	10,869	86.1
Operating earnings	NA	785	NA
Division sales	**1990**	**1989**	**% chg**
Imaging	7,128	6,998	1.9
Chemicals	3,588	3,522	1.9
Health	4,349	4,009	8.5
Information systems	4,140	4,200	(1.4)

CORPORATE PROFILE

Eastman Kodak Co. continues to make major cuts in its work force as it streamlines operations.

The latest round of cuts, a reported 3,000 this August, follows cuts of 11,000 in 1983, 13,000 in 1986 and 5,000 in 1989— and will take place companywide.

Tighter cost controls helped increase net income 32.9%, despite a charge of $888 million—the amount of a court settlement awarded Polaroid Corp. after winning an instant photography patent infringement suit against Kodak.

As expected, Kodak's 1990 marketing budget proved vulnerable to the changes. Kodak carved 7.5% from ad spending.

Batteries took a big hit, dropping to $2 million in media from $15 million.

Ad spending was slashed 31% on Bayer aspirin, matching similar spending cuts by most aspirin marketers. Bayer Plus was introduced with $4.7 million in media.

Spending on Kodak's biggest ad-supported categories—film and film processing—remained steady with some $60 million in combined measured media.

The launch of Photo CD last fall and its pending global introduction in mid-1992 is considered a crucial move for Kodak, which has been criticized for its lack of new photographic technology.

Photo CD is a film/electronic imaging photographic system that allows TV viewing of still photos through the transfer of 35mm negatives onto compact discs.

Sterling Drug in [illegible] formed a joint venture with French [illegible] maker Sanofi to share research and marketing resources for pharmaceutical and consumer healthcare products.

In an agency realignment, Kodak and Sterling consolidated this June more than $100 million in TV media buying assignments at Lintas:USA. The account involves TV buying for all major brands. The move stripped J. Walter Thompson USA of about $50 million; Lintas already had the rest.

Ironically, Lintas:New York in April resigned the Bayer account citing "strategic differences." Sources said it opposed Sterling's intent to extend the Bayer name into ibuprofen or acetaminophen-based products. Bayer, with about $200 million in sales in 1990, is fourth at about a 6% share of the $2.7 billion analgesic market.

Bayer, along with Panadol, was reassigned to N W Ayer in July. Lintas won Midol, which was at Warwick Baker & Fiore, and Vanquish, which had been unassigned.

HEADQUARTERS

Eastman Kodak Co./342 State St./Rochester, N.Y. 14650/Phone: (716) 724-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard Bartlett, vp-dir, mktg comms.

Amateur films, photofinishing: J. Walter Thompson USA, New York. Rodger Groves, mgmt dir.

Business, industrial: J. Walter Thompson, New York. Doug Foster, sr vp-acct dir.

Cameras: Young & Rubicam, New York. Harry Rosenberg, acct dir.

Professional photography div, motion picture-TV div, electronic photography, consumer products-sales promo, film-trade adv, camera-trade adv, photofinishing-trade adv, batteries-trade adv: Rumrill-Hoyt, Rochester, N.Y. William Stein, sr vp-dir, client svcs.

Hispanic & black adv-film: UniWorld Group, New York. Idalia Romero-Boddie, vp-grp acct dir.

Health div, clinical products: Deltakos, New York. Rosemarie Azzaro, acct exec.

STERLING DRUG INC.: Hilary Hinchman, dir-adv svcs.

GLENBROOK LABORATORIES: Dave Mahder, vp-mktg; Larry Koslow, category dir-analgesics; Lisa Rubin, category dir-GI & C/C; Susan Danehower, dir-new prods; Gerard Mattimore, dir-mktg svcs; Ginger Byrne, promo material mgr.

Bayer, Panadol, [illegible]: N W Ayer, New York. Dom Rossi, pres-Ayer USA.

Medical communications: Harrison, Star, Wiener & Beitler, New York. Tom Harrison, pres.

Dairy Ease, Phillips line, Stri-Dex, Campho-Phenique, Neo-Synephrine, NaSal, pHisoDerm: Ammirati & Puris, New York. Mary Herrmann, exec vp-grp dir.

WINTHROP PHARMACEUTICALS: Martin Coyne, vp-pharmaceutical prods div; John Cornille, vp-sales, pharmaceutical prods div; Dan Peters, vp-hospital prods div; Jack Talley, vp-mktg, hospital prods div; Don Eans, vp-sales, hospital prods div; Tom Giordano, vp-managed healthcare, hospital prods div; Michael Namgle, vp-hospital information grp, hospital prods div.

Carpuject, [illegible], Talwin NX: Vargas & Levy, New York. Tom Vargas, pres.

Plaquenil, Inocor I.V.: Kallir, Philips, Ross Inc., New York. Norman Cooper, pres.

Omnipaque: Lally, McFarland & Pantello, New York. Ron Pantello, pres.

Omnipaque Radiology, Omnipaque Cardiology: Lavey/Wolff/Swift, New York. Charles Rockefeller, pres.

L&F PRODUCTS: Peter Black, grp vp; Hilary Hinchman, vp-adv svcs; Kevin Dunn, vp-mktg, household prods div; Jimmie Byrum, vp-sales, household prods; Peter Stearns, vp-mktg, personal prods div; Terry Shunnarah, vp-sales, personal prods; Jon Krance, vp-mktg, natl labs; Bruce Letsch, vp-sales, natl labs; Richard A. Bachman, vp-mktg, Minwax; Kathy Tousignant, vp-sales, Minwax; Frederick D. Miller, vp-mktg, Thompson & Formby; Thomas E. Harris, vp-sales, Thompson & Formby.

Lysol products, Love My Carpet, Mop & Glo: Lintas New York. John Barnes, exec vp.

Lysol Direct, Wet Ones, Chubs, [illegible], d-Con rodenticides, Resolve carpet cleaner: Warwick Baker & Fiore, New York. John Sloan, grp acct dir.

RID-X septic tank additive: Ramm Advertising, Cranford, N.J. Ed Ramon, pres.

Ogilvie, Tussy, Dorothy Gray: Jordan, McGrath, Case & Taylor, New York. Linda Schaler, sr vp-mgmt super.

Diaparene: Warwick Baker & Fiore. Wile[illegible] Baker, pres-ceo.

Minwax-consumer, industrial products: Gilbert, Whitney & Johns, Whippany, N.J. John Leonardi, pres.

Thompson & Formby: Slater Hanft Martin, New York. Terry Koch-Bostic, sr vp-mgmt super.

Red Devil: Lintas: New York. John Barnes, exec vp.

RANK: 41

Federated Department Stores

Cincinnati

Ad spending: **$273.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	1,484	2,208	(32.8)
Sunday magazine	1,027	1,509	(31.9)
Newspaper	134,483	143,998	(6.6)
Outdoor	0	0	NA
Spot TV	17,901	16,665	7.4
Cable TV networks	1	0	NA
Spot radio	1,013	3,578	(71.7)
Measured media	155,910	167,958	(7.2)
Unm[illegible]sured	117,800	126,900	(7.2)
Tot[illegible]	273,710	294,858	(7.2)
By t[illegible] brands	**1990**	**1989**	**% chg**
Abraham & Straus apparel	13,472	11,872	13.5
Bloomingdale's stores	12,253	16,098	(23.9)
Abraham & Straus general	11,155	10,315	8.1
Bloomingdale's general	11,142	11,094	0.4
Bloomingdale's apparel	10,272	8,814	16.5
Abraham & St[illegible] househol[illegible]	7,996	8,572	(6.7)

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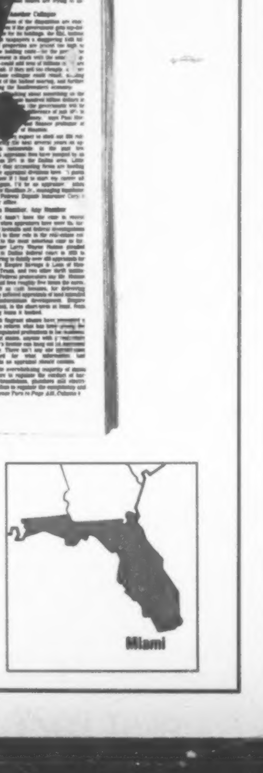

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U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Rich's general	6,734	6,765	(0.5)
Rich's apparel	6,378	6,931	(8.0)
Rich's household	6,352	9,264	(31.4)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	NA	10,439	NA
Earnings	NA	(1,740)	NA

CORPORATE PROFILE

The debt-ridden U.S. divisions of Campeau Corp., Allied Stores Corp. and Federated Department Stores, mired in bankruptcy proceedings for more than a year, proposed a recovery plan in October 1990 to get out from under Campeau's crushing $8.2 billion debt load.

The plan, to combine Federated and Allied into a new company called Federated Department Stores, would provide creditors stock in lieu of cash and reduce Campeau's debt burden to $2.8 billion by February 1992.

However, continued wrangling with creditors is prompting amendments to the plan.

If approved, Campeau would emerge with virtually no stake in any of the store chains.

Financial burdens and a weak 1990 holiday retailing season drove ad spending down 7.2% to $155.9 million.

Most of the decline came in newspapers, down 6.6% to $134.5 million. The medium represents 86% of media advertising.

Advertising by Federated/Allied's flagship Bloomingdale's slipped 5.8% to $37.2 million. Ad slashing also occurred at Lazarus, down 11.5% to $8.5 million; Jordan Marsh, 11.8% to $17 million; Rich's, 10.6% to $22 million; and Sterns, 21.7% to $14.4 million. Abraham & Straus' outlays rose 8% to $35.2 million.

Further downsizing will include the unloading of 12 Jordan Marsh stores in Florida. Several suitors are in the wings: Mervyn's division of Dayton Hudson Corp., J.C. Penney Co., Montgomery Ward & Co. and Dillard Department Stores.

Allied/Federated's "spending doesn't completely hinge on the outcome of the bankruptcy proceeding," said Kurt Barnard of the *Barnard Retail Marketing Report*. He said strong management now in place will assure higher spending to boost sales, particularly as the crucial holiday selling season approaches.

HEADQUARTERS

Federated Department Stores/7 West Seventh St./Cincinnati, Ohio 45202/Phone: (513) 579-7000.

PERSONNEL, BRANDS, AGENCIES

ABRAHAM & STRAUS: Joseph Yewdell, sr vp-mktg/sales promo; Joe Cantor, vp-admin; Nancy Slaven, operating vp-direct mail; Linda McLaughlin, vp-media.

Martino & Co., New York. Cathy Hart, Gary Wuertenberger, acct supers.

BLOOMINGDALE'S: Tim Oberg, vp-bus mgmt/adv; John Jay, exec vp-sales promo.

Bloomingdale's broadcast adv: Grey Advertising, New York. Herb Lieberman, exec vp.

BURDINE'S: Carey Watson, sr vp-mktg; Linda Frankel, vp-adv; Jorge Lopez, operating vp-adv adm'n/prodn; Jane Smiley, operating vp-special events/publicity; Gilbert Lorenzo, div sales support mgr.

In-house.

LAZARUS: Timothy Worcester, sr vp-mktg/sales promo; Herbert Frager, div vp-graphics dir; Ralph Holt, div vp-dir, adv/analysis; Becky Case, div vp-adv/special events.

In-house.

RICH'S: Donald Van Suilichem, sr vp-mktg dir; Alma Freedman, div vp-adv dir; John Thomas, vp-creative dir.

In-house. Broadcast adv: Babbit & Reiman, Atlanta. Michael Gaffney, gm.

ALLIED STORES CORP.: THE BON MARCHE: John Buller, sr vp-mktg/sales promo; Trisha Gregory, vp-creative dir; Mark Gordon, photo studio mgr; Bev Davies, bdcast-ROP dir; Sue Sleeth, direct mail dir; Val Walser, adv operations dir.

In-house.

ALLIED STORES CORP.: JORDAN MARSH-NEW ENGLAND: John Macht, sr vp-dir mktg; Mike Kelly, vp-planning/admin; Joel Benjamin, vp-creative dir.

Broadcast adv: Smith Patterson (in-house), Boston. Jean Publicover, media dir.

ALLIED STORES CORP.: MAAS, INC.: Thomas Ford, sr vp-mktg; Rebecca Hollifield, creative dir; B.J. Rhodes, adv dir.

In-house.

ALLIED STORES CORP.: STERNS: Howard Fraser, sr vp-mktg/adv; Ursula Drake, adv dir.

In-house.

ALLIED STORES CORP: RALPH'S GROCERY CO.: Al Marasca, exec vp-retail; Kevin Davis, vp-sales/adv; Terry Peets, sr vp-mktg.

Davis, Ball & Colombatto Advertising, Los Angeles. Carol Begelman, vp-acct super.

RANK: 16

Ford Motor Co.

Dearborn, Mich.
Ad spending: $616.0 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	148,916	142,798	4.3
Sunday magazine	1,137	892	27.5
Newspaper	25,881	30,149	(14.2)
Outdoor	2,485	3,148	(21.1)
Network TV	196,898	201,372	(2.2)
Spot TV	54,271	56,404	(3.8)
Syndicated TV	13,707	6,634	106.6
Cable TV networks	9,491	7,502	26.5
Network radio	14,874	11,180	33.0
Spot radio	3,676	13,390	(72.5)
Measured media	471,335	473,468	(0.5)
Unmeasured	144,700	145,300	(0.4)
Total	616,035	618,768	(0.4)
By top brands	**1990**	**1989**	**% chg**
Ford cars	220,870	198,501	11.3
Ford trucks & vans	108,275	105,048	3.1
Mercury cars	65,002	65,586	(0.9)
Lincoln cars	29,906	32,463	(7.9)
Jaguar cars	20,000	13,558	47.5
Ford car stereo systems	7,977	8,008	(0.4)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	97,650	96,146	1.6
Earnings	860	3,935	(78.1)
U.S.	**1990**	**1989**	**% chg**
Sales	56,902	61,452	(7.4)
Net income	(17)	1,099	NA
Division sales	**1990**	**1989**	**% chg**
Automotive	81,844	82,679	(1.2)
Financial svcs	15,806	13,267	19.1

CORPORATE PROFILE

While Ford Motor Co. has proved to be extremely vulnerable to the weak U.S. economy, some say the carmaker set itself up for its bumpy ride by bringing too few exciting entries to the market.

To counter mounting problems—a 3.9% slump in U.S. sales and 61.4% drop in U.S. net income last year—Chairman Harold Poling in February 1991 announced plans to cut the salaried work force, saving $3 billion by yearend.

The setbacks followed several years in which Ford got high marks for profitability and for bringing to market popular products. But by 1991, some analysts said Ford slipped fighting the onslaught of Japanese competitors and a revived General Motors Corp.

The No. 2 auto marketer's share of the U.S. car category was 20.9% in 1990, down 1.4 percentage points from 1989. Ford Division also lost the lead in overall car sales to GM's Chevrolet. The slippage primarily reflected lower shares of the small-car segment, the result of slow initial sales of the redesigned Ford Escort and Mercury Tracer, both introduced in spring 1990.

The new subcompacts received the biggest ad backing of any Ford products during 1990. Ford Division spent $72.8 million in measured media for the Escort in 1990, and Lincoln-Mercury supported the Tracer with $32.4 million. Escort sales dropped 13.4% during the year to 288,727, and Tracer fell 40.5% to 34,494.

On the truck side, Ford scored a major hit with the Explorer, its new compact sport-utility vehicle that replaced the Bronco II in April 1990. Ford sold 181,748 of the Bronco II and Explorer vehicles in 1990, giving it leadership in the segment.

Altogether, Ford boosted its truck share in 1990 to 29.9%, up from 29.3%. The company's share of the combined car and truck market was 23.9%, down from 24.6%.

Ford tried to break away from the consumer incentive game in December 1990, dropping most rebates in favor of providing promotional money to dealers. But Ford reneged in the spring, saying it was too hard to make the strategy work in a down market with competitors stepping up their consumer lures.

The company introduced new full-size cars in 1991, the Ford Crown Victoria bowing in March and the Mercury Grand Marquis bowing a month later.

HEADQUARTERS

Ford Motor Co./The American Rd./Dearborn, Mich. 48121/Phone: (313) 322-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Hal Augustine, adv/comms mgr.

Wells Rich Greene BDDP, New York. William Benton, exec vp-Detroit.

FORD DIV: Ross Roberts, vp-gm; Phil Novell, genl sales mgr; Keith Magee, genl mktg mgr; John Vanderzee, adv mgr; Robert Gillooly, car adv mgr; Dave Pohlod, truck ad mgr; Toby Hynes, merch mgr.

J. Walter Thompson USA, Detroit. Charles Balestrino, exec vp-gm. Minority adv: Burrell Advertising, Chicago. Charles McClellan, vp-acct dir.

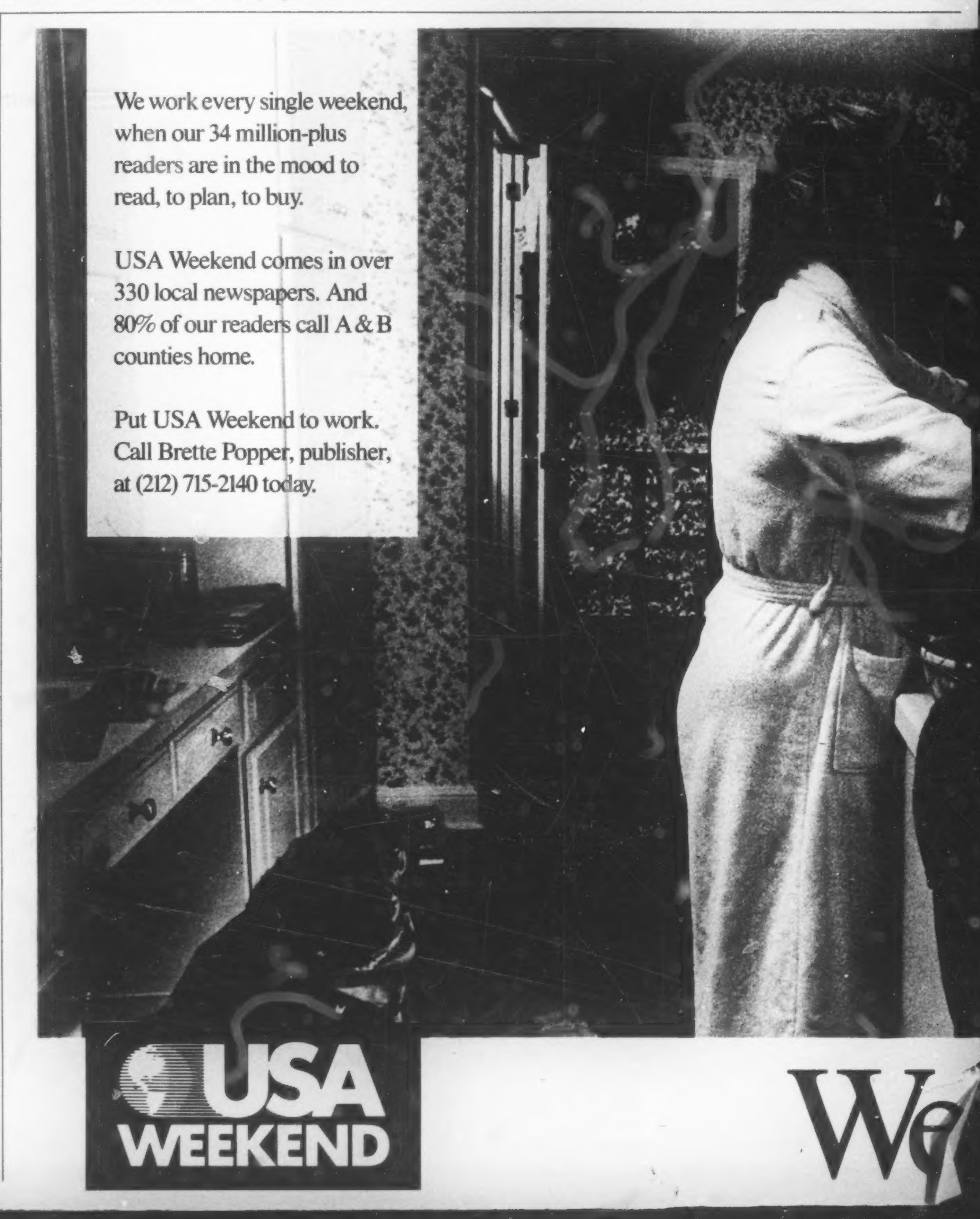
LINCOLN-MERCURY DIV: Lee Miskowski, vp-gm; Mark Hutchins, genl sales mgr; Ian McAllister, genl mktg mgr; Stephen Lyons, ad mgr; Don Kaegi, merch mgr; Chuck Schneider, major mkt dealer ad mgr.

Young & Rubicam, Detroit. Michael Howe, pres-ceo. Minority adv: UniWorld Group, New York. Fermina Platon, vp-dir mktg.

FORD PARTS & SERVICE DIV: Thomas Wagner, vp-gm; Jack Clissold, genl sales/mktg mgr.

Ogilvy & Mather, Dearborn, Mich. Jan Starr, sr vp-gm.

FORD MOTOR CREDIT: D.S. Cook Jr., exec vp-N.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USA WEEKEND

American auto financing.

Wells Rich Greene BDDP, New York. William Benton, exec vp-Detroit.

JAGUAR CARS INC.: Robert Burden, vp-mktg; Michael O'Driscoll, mkt plans mgr; Alan Taylor, ad mgr.

Geer, DuBois, New York. Timothy O'Leary, sr vp-mgmt super.

RANK: 48

General Electric Co.

New York

Ad spending: **$230.2** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	36,444	38,332	(4.9)
Sunday magazine	1,502	962	56.2
Newspaper	16,488	23,634	(30.2)
Outdoor	1,135	1,413	(19.7)
Network TV	23,733	28,662	(17.2)
Spot TV	16,753	12,116	38.3
Syndicated TV	221	12	1,760.5
Cable TV networks	2,555	2,689	(5.0)
Network radio	3,830	2,819	35.9
Spot radio	2,473	3,129	(21.0)
Measured media	105,134	113,786	(7.6)
Unmeasured	125,100	135,300	(7.5)
Total	230,234	249,086	(7.6)
By top brands	**1990**	**1989**	**% chg**
NBC TV	39,458	34,108	15.7
Corporate spending	21,232	28,752	(26.2)
GE refrigerators & freezers	16,035	5,441	194.7
GE lighting equipment	8,001	8,674	(7.8)
GE major appliances	6,356	6,878	(7.6)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	58,414	54,574	7.0
Earnings	4,303	3,939	9.2
U.S.	**1990**	**1989**	**% chg**
Sales	51,270	48,912	4.8
Operating profit	6,862	6,070	13.0
Division sales	**1990**	**1989**	**% chg**
Aerospace	5,614	5,282	6.3
Aircraft engines	7,558	6,863	10.1
Broadcasting	3,236	3,392	(4.6)
Industrial	7,040	7,059	(0.3)
Major appliances	5,706	5,620	1.5
Materials	5,146	4,929	4.4
Power systems	5,804	5,129	13.2
Technicals prods. svcs.	4,783	4,545	5.2
GEFS	14,774	12,945	14.1
Other	275	319	(13.8)

CORPORATE PROFILE

General Electric Co. proved military weapons, toaster ovens and light bulbs are better businesses than media to be in during a weak economy.

Double-digit sales gains from the company's aircraft engines, major appliances, power systems and financial services units more than offset a 4.6% decline at its NBC broadcasting division, which had a 20.9% decrease in operating profit.

GE in the process pared 7.6% from 1990 U.S. media spending supporting its product lines—largely NBC, appliances and light bulbs—emphasizing print media and national broadcast at the expense of spot TV (down 38.3%) and spot radio (down 21%).

GE increased media spending on NBC by 15.7%; consumer magazines remained the primary outlet.

NBC ratings and revenue share dropped significantly in 1990. The network's waning performance and a relatively uncompetitive environment due to tight regulation of the Big 3 networks have fueled speculation GE might soon divest NBC.

NBC Entertainment President Warren Littlefield maintains the network has a winning strategy for this fall's prime-time schedule, even though agency media executives predict it will be virtually a three-way tie.

John Miller, exec VP-advertising, promotion and daytime and children's programs, devised a fall advertising and promotion strategy that breaks from tradition.

Mr. Miller said NBC will put its advertising and promotional weight behind specific series vs. a schedule-wide effort. Like movie ads, Mr. Miller said, ads for new NBC series will be placed in movie buff magazines and similar media.

HEADQUARTERS

General Electric Co./3135 Easton Turnpike/Fairfield, Conn. 06431/Phone: (203) 373-2211.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard A. Costello, mgr-corp mktg comms; James R. Harman, mgr-corp adv; Victor H. Alcott, mgr-GE Appliances adv; James S. Pomeroy, mgr-GE Lighting adv; William S. Kelly, vp-pr/adv, GE Capital.

Brand image, corp ads, major appliances, lighting: BBDO Worldwide, New York. John Marchese, acct dir-corp mktg/GE Appliance Group; Ken Angel, acct dir-GE automobile headlamps/GE batteries/GE Retail Lighting.

GE Capital: Jordan, McGrath, Case & Taylor, New York. Jack Taylor, vice-chmn.

NBC ENTERTAINMENT: John D. Miller, exec vp-adv/promo, daytime/children's programs; Alan Cohen, sr vp-mktg, NBC TV; Vince Manze, vp-adv/promo, West Coast; Tim Miller, vp-adv/promo East Coast; Preston Beckman, vp-prog/prog planning, West Coast; Jim Vescera, vp, on-air promo; Martha Stanville, vp-affiliate adv/promo svcs; Jenness Brewer, vp-print adv; Marla Goldstein, dir-media planning.

D'Arcy Masius Benton & Bowles, Los Angeles. Jim Helin, mg dir.

RANK: 20

General Mills

Minneapolis

Ad spending: **$539.0** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	18,380	16,590	10.8
Sunday magazine	751	0	NA
Newspaper	2,531	951	166.2
Outdoor	514	388	32.6
Network TV	142,851	144,975	(1.5)
Spot TV	191,497	150,240	27.5
Syndicated TV	15,137	10,907	38.8
Cable TV networks	27,411	21,306	28.6
Network radio	5,036	5,407	(6.9)
Spot radio	2,464	1,913	28.8
Measured media	406,581	352,675	15.3
Unmeasured	132,400	114,900	15.2
Total	538,981	467,575	15.3
By top brands	**1990**	**1989**	**% chg**
Cheerios cereal	81,771	68,109	20.1
Red Lobster Inns restaurants	60,799	58,068	4.7
Total cereal	42,150	42,016	0.3
Betty Crockers dinners	15,719	11,953	31.5
Oatmeal Crisp cereal	15,369	14,331	7.2
Fruit Corners snacks	14,849	11,928	24.5
Cinnamon Toast crunch cereal	13,671	7,623	79.3
Kix cereal	13,482	7,692	75.3
Wheaties cereal	13,175	10,277	28.2
Trix cereal	11,930	8,012	48.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	7,153	6,448	10.9
Earnings	473	381	24.1
U.S.	**1990**	**1989**	**% chg**
Sales	6,377	5,796	10.0
Operating profits	710	656	8.2
Division sales	**1990**	**1989**	**% chg**
Consumer foods	4,939	4,520	9.3
Restaurants	2,213	1,928	14.8

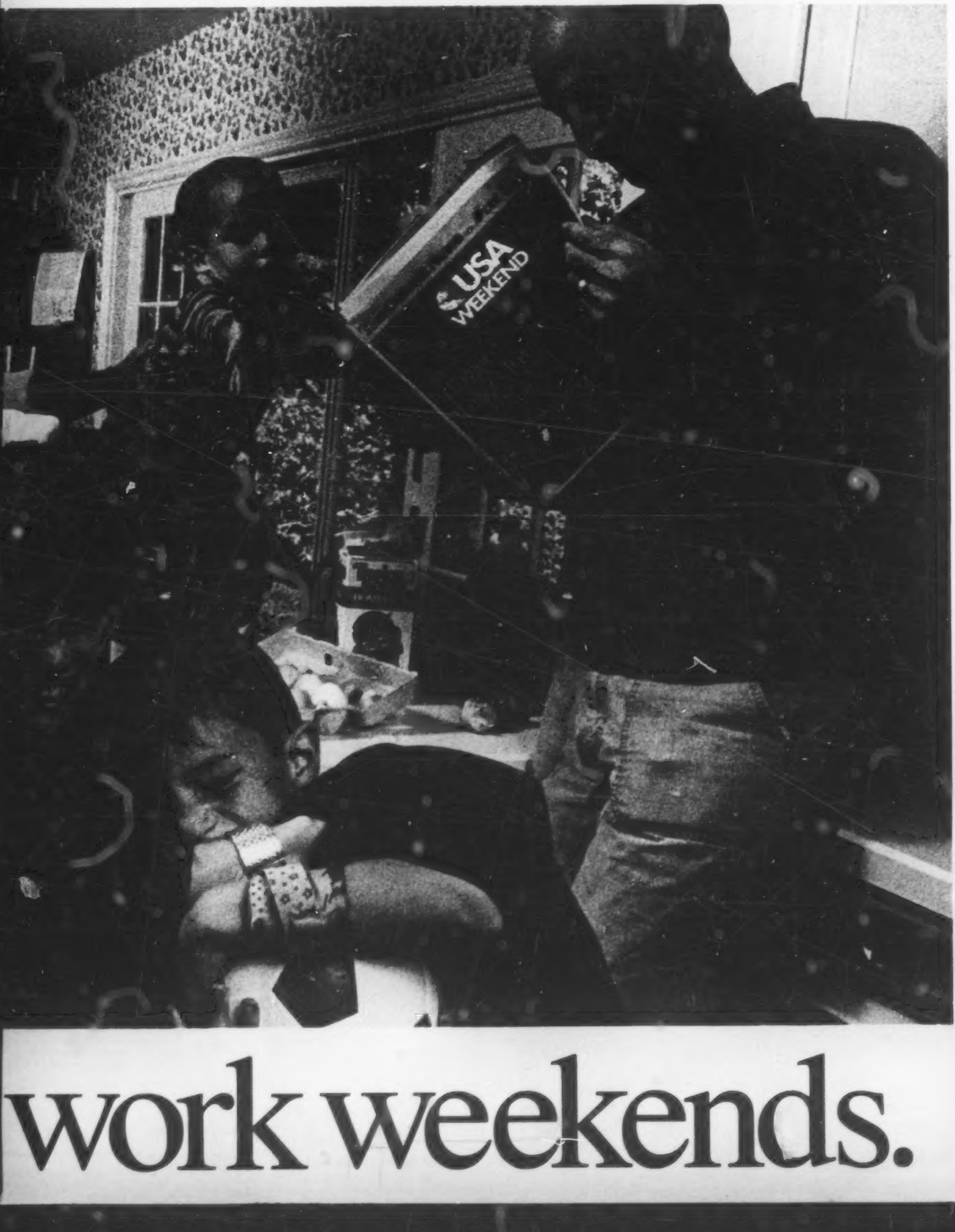
CORPORATE PROFILE

And now, for General Mills' next trick: topping the stellar results it posted in the past year while both its segments—package foods and restaurants—seek to buck declines surfacing industrywide.

General Mills' U.S. consumer foods unit volume grew 7.9% for its fiscal year ended May 26, as the company's food sales rose 9%; restaurant sales rose 15%.

Paralleling those sales and unit volume increases was a whopping 15.3% increase in companywide U.S. measured media spending for calendar 1990. Compare that to Kellogg Co., whose media spending fell 5.5% in 1990, and Quaker Oats Co., whose spending fell 8%.

Ready-to-eat cereals alone account for nearly 30% of General Mills' sales. Constrained by production capacity, it couldn't introduce a host of new cereals in 1990 but instead dramatically boosted spending on established brands.



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The net result: General Mills' pound share of the $7.2 billion cold-cereal business increased to 24.3% in calendar 1990 from 23.4%, bringing it closer to market leader Kellogg's 37.5% than ever before.

But having built its share through older brands and with line extensions to the Cheerios and Total franchises, General Mills is now trying to prove it can also build new brands: In February 1991, it launched Triples, a Rice Krispies competitor, and Basic 4, a premium-price value-added cereal. This fall, it will try its first Wheaties extension, a presweetened version called Wheaties Honey Gold, hitting Eastern markets this month.

The General Mills/Nestle joint venture, Cereal Partners Worldwide, launched its first two cereals in Europe, Golden Grahams and Honey Nut Cheerios, in a push to build a $1 billion non-U.S. cereal business by 2000.

General Mills confirmed months of industry rumors when it announced in June 1991 it was withdrawing Total Oatmeal, Under Cover Bears and Oatmeal Swirlers from the hot-cereal market. But its three-season foray into Quaker's back yard was one of only a very few blotches on General Mills' 1990 record. General Mills also suffered share and unit volume declines with Gorton's seafood and Yoplait yogurt.

Led by Pop Secret and Hamburger Helper, the Betty Crocker division posted a unit volume increase of 13% in fiscal 1991. Pop Secret continued No. 2 in the $428 million microwave popcorn market to ConAgra's Orville Redenbacher's brand (29% to 40.7%), but Pop Secret posted a 36% sales increase in calendar 1990. A colored popcorn aimed at kids, Pop Qwiz, will make its debut this fall.

Betty Crocker continued to pace the $1 billion baking mix category with a 40% share to Procter & Gamble Co.'s 27% and Pillsbury Co.'s 22%. Betty Crocker added a line of SuperMoist Light cake and brownie mixes and ready-to-spread frostings with reduced fat and calorie levels, and MicroRave Singles, single-serving cake and brownie mixes.

General Mills' restaurant division, the nation's eighth-largest restaurant operator, had sales of $2.2 billion in fiscal 1991, up 15%, primarily reflecting aggressive expansion of the Olive Garden and Red Lobster chains. Average unit sales for both chains were relatively flat.

HEADQUARTERS

General Mills/Number One General Mills Blvd./Minneapolis, Minn. 55426/Phone: (612) 540-2311.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Donald L. Knutzen, vp-gm, mktg svcs; Robert J. Blake, dir-adv svcs, consumer foods.

CONSUMER FOODS: Stephen W. Sanger, sr vp-pres, Big G div; Stephen W. Warhover, sr vp-pres, Gorton's; Roger W. Rumble, pres-foodservice; David K. Murphy, pres-Betty Crocker div; Michael E. Cushmore, pres-Sperry div; Jon L. Finely, pres-Yoplait USA; Edward K. Bixby, sr vp-pres, consumer foods sales; Gary M. Rodkin, pres-Bringers.

Trade advertising: Bozell, Minneapolis. Eric Forslin, vp-acct super.

Bugles, Cinnamon Toast Crunch, Nature Valley Granola Bars, Oatmeal Crisp, Oatmeal Raisin Crisp, Pop Qwiz, Pop Secret: Campbell-Mithun-Esty, Minneapolis. Tom Hanft, Les Mouser, exec vps-dirs, acct svcs.

Bac-O's, Basic 4, Betty Crocker dessert mixes & potatoes, Bisquick, Crispy Wheats 'n Raisins, Golden Grahams, Hamburger Helper, Skillet Chicken Helper, Raisin Nut Bran, Tuna Helper, Wheaties, Wheaties Honey Gold, Yoplait: DDB Needham Worldwide, Chicago. Robert L. Klein, Peter Kuntz, vps-mgmt reps.

Bringers: Fallon McElligott, Minneapolis. Mary Weber, mgmt super.

Gorton's: Laurence, Charles, Free & Lawson, New York. Pamela Schreiber, acct super.

Foodservice: Carmichael Lynch, Minneapolis. Rob West, exec vp-CL Technologies.

Berry Bears fruit snacks, Cheerios, Clusters, Cocoa Puffs, Fiber One, Fruit by the Foot, Fruit Roll-Ups, Fruit Wrinkles, Garfield fruit snacks, Kix, Lucky Charms, Monster cereals, Shark Bites fruit snacks, Squeezit, Surf's Up! fruit snacks, Thunder Jets fruit snacks, Total, Triples, Trix: Saatchi & Saatchi Advertising, New York. Skip Sims, exec vp-exec mgmt dir.

RESTAURANTS: Jeffrey J. O'Hara, pres-Red Lobster USA; Ronald N. Magruder, pres-The Olive Garden; Blaine Sweat III, pres-China Coast.

Red Lobster, Olive Garden: Grey Advertising, New York. Jordan Rosuck, exec vp.

RANK: 4

General Motors Corp.

Detroit

Ad spending: **$1,502.8** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	207,184	213,524	(3.0)
Sunday magazine	9,112	12,328	(26.1)
Newspaper	46,583	55,654	(16.3)
Outdoor	3,963	3,693	7.3
Network TV	598,370	506,514	18.1
Spot TV	136,478	90,921	50.1
Syndicated TV	27,602	20,672	33.5
Cable TV networks	25,963	21,040	23.4
Network radio	25,223	35,310	(28.6)
Spot radio	20,451	39,477	(48.2)
Measured media	1,100,929	999,131	10.2
Unmeasured	401,900	364,700	10.2
Total	1,502,829	1,363,831	10.2
By top brands	**1990**	**1989**	**% chg**
Chevrolet cars	164,312	186,732	(12.0)
Buick cars	158,685	116,803	35.9
Chevrolet light trucks	138,824	108,307	28.2
General Motors cars	129,331	79,681	62.3
Oldsmobile cars	106,091	129,551	(18.1)
Pontiac cars	85,145	112,477	(24.3)
Geo Metro & Tracker	67,081	68,999	(2.8)
Cadillac cars	65,072	48,989	32.8
General Motors auto parts	35,064	36,681	(4.4)
Saturn Corp.	31,591	0	NA

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	124,705	126,932	(1.8)
Earnings	(1,986)	4,224	(147.0)
U.S.	**1990**	**1989**	**% chg**
Sales	86,967	93,164	(6.7)
Net income	(4,570)	1,813	NA
Division sales	**1990**	**1989**	**% chg**
Automotive	96,906	99,106	(2.2)
Financing & insurance	11,812	11,254	5.0
Other	13,303	12,852	3.5

CORPORATE PROFILE

On Aug. 1, 1990, Robert Stempel enjoyed a full day in his new job as chairman of General Motors Corp. before his first crisis. Saddam Hussein invaded Kuwait the next day, triggering oil fears and plunging the automotive industry into a deep sales downturn.

The recession helped produce an overall earnings loss at GM in 1990, even though the company was the only domestic auto marketer to gain market share. GM took a $2.1 billion write-off in the third quarter, reflecting the cost of closing four previously idled U.S. assembly plants. Excluding the special charge, GM earned $102 million in 1990.

GM whacked away at budgets, including advertising. Sources indicated GM's total ad spending for 1991 would come in about $200 million less than in 1990.

After seeing its U.S. market share erode steadily during the '80s, GM captured 35.5% of the combined car and light-truck market in 1990, compared with to 35.1% the year before. Its 1990 car share was 35.6%, up from 35.2%; its light-truck share was 35.4%, up from 34.9%; its overall new-vehicle share rose to 35.5% from 35.1%, according to *Automotive News*.

The earnings downturn continued in the first half of 1991, when GM lost $1.2 billion. GM's overall market share was 35.5%, down from 35.9% in the first half of 1990.

GM's Saturn project got off the ground, beginning a regional rollout of its first two models in October 1990. Saturn sold 1,881 cars in 1990, less than 0.1% of the car market. Production and sales slowly accelerated during the first half of 1991, as Saturn sold 25,320 cars during that period.

Chevrolet division, boosted by strong Geo sales, increased its share of the U.S. car market to 14.7% in 1990, up from 13.8% driving past Ford as the leader in car sales. Chevrolet officials credited the "Get to know Geo" ad campaign with boosting awareness. Chevrolet's truck share dropped to 27.1% from 27.4%.

Buick was GM's biggest success story, taking 5.8% of the car market in 1990, up from 5.6%, and climbing to 6.6% in the first half of 1991. A sustained, cohesive approach to developing product and image around the "premium American motorcar" theme, and measurably improved quality, triggered the upsurge.

Pontiac struggled from the lack of new product, its car market share dropping to 6.8% from 6.9%, and to 6.4% in the first half of 1991. Sales of the Trans Sport minivan introduced in 1989 gave Pontiac 0.7% of the 1990 truck market, compared with 0.1% the year before.

Cadillac inched up from 2.7% of the car market in 1989 to 2.8% in 1990, but fell to 2.5% in the first half of 1991 as the luxury car segment took a tumble. Cadillac launched two critical products in September 1991, a redesigned Seville and Eldorado aimed at import-lovers.

Oldsmobile continued slumping, falling to 5.5% from 6.1%, and 5.1% in the first half of 1991. The division took 0.6% of the truck market in 1990, up from less than 0.1%, the result of rolling out a minivan in late 1989 and a sport-utility vehicle in late 1990. In July 1991, the division switched to a product-oriented ad approach, "The power of intelligent engineering."

GMC's share of the light-truck market dropped to 7.1% from 7.4% and to 6.9% in the first six months of 1991.

GM continued to be a major player on the media front. The company inked an estimated $80 million cross-media deal with Time Warner; committed to being a broadcast sponsor on NBC's coverage of the 1992 Summer Olympics; signed an estimated $400 million, seven-year deal with CBS for coverage of regular season and Final Four NCAA basketball telecasts; signed on as a charter sponsor of Turner Broadcasting System's "Airport Channel"; and became the first title sponsor of the U.S. Armed Forces Sports Championships.

HEADQUARTERS

General Motors Corp./3044 W. Grand Blvd./Detroit, Mich. 48202/Phone: (313) 556-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: J.B. Fitzpatrick, vp-comms/mktg staff; P. Guarascio, exec-in-charge, corp mktg/adv; V.P. Barabba, exec-in-charge, mkt research design center; D.J. Teasdale, dir-adv operations; H.D. Weed, dir-consumer influence operations; M.A. Browner, genl dir-media operations; J. Kornas, dir-strategic merch/mktg prog; D.P. Bolen, adv operations mgr; R.J. Muratore, mgr-public affairs adv; K.M. Gramling, adv super; E.C. Lazar, mgr-media operations.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. Ronald Monchak, mg dir. N W Ayer, Detroit. Dannielle Colliver, pres. The Mingo Group, New York. Samuel Chisholm, pres.

CONSUMER MARKET DEVELOPMENT: Shirley Young, vp-consumer mkt devel; Jim Panaretos, mgr-consumer mkt devel; Ronald Muratore, mgr-public affairs adv.

McCann-Erickson Worldwide, New York. Sean Fitzpatrick, exec vp worldwide-GM acct/creative mgmt.

BUICK MOTOR DIV.: E.H. Mertz, vp-gm; R.E. Coletta, genl sales/svcs mgr; D.E. Clark, genl mktg mgr; B.W. Edwards, dir-strategic mktg; J.W. Qualman Jr., genl dir-adv.

McCann-Erickson, Troy, Mich. Gerald Atkin, exec vp.

CADILLAC MOTOR CAR DIV.: John Grettenberger, vp-gm; Peter Gerosa, genl sales/svc mgr; Ellie Torre, asst genl sales mgr-mktg; Peter Levin, dir-adv; Richard Sheridan, mgr-adv.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. Alexander Morton III, exec vp-mgmt super.

CHEVROLET MOTOR DIV.: J.C. Perkins, gm; R. W. Starr, genl sales/svc mgr; J.P. Hurlbert, genl mktg mgr; K.L. Ritter, mktg mgr-trucks; S.D. McAvoy, mktg mgr-pass car; J.D. Jandasek, mgr-passenger car adv; R.M. Whisner, mgr-truck adv.

Lintas:Campbell-Ewald, Warren, Mich. Richard O'Connor, chmn-ceo. Regional agency-West: Vic Olesen & Partners, Culver City, Calif. Victor Olesen, pres-partner.

GENERAL MOTORS ACCEPTANCE CORP.: J.R. Edman, chmn; W.J. Lovejoy, pres; H.L. Davis, grp vp-mktg; G.P. Whitlinger, exec vp-operations; C.A. Krauss Jr., vp-public affairs/adv.

Lintas:Campbell-Ewald, Warren, Mich. Michael Tuite, sr vp-grp mgmt super.

GENERAL MOTORS SERVICE PARTS OPERATIONS: A.M. Long, exec-in-charge of svc parts operations; L.J. Decker, genl dir-sales/svc; D.P. Robison, dir-mktg/prod prog; B.J. Snelson, dir-adv/sales promo.

Lintas:Campbell-Ewald, Warren, Mich. Jeffrey Jacobs, sr vp-mgmt super.

GENERAL MOTORS PARTS: E.H. Smith, genl sales mgr-GM dealers.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. Theodore Teegarden, exec vp-mgmt super.

GMAC MORTGAGE CORP.: G.C. Thomas, pres-ceo; F.A. Henderson, exec vp; R.A. Gillespie, vp-pr/adv.

Lintas:Campbell-Ewald, Warren, Mich. Michael Tuite, sr vp-grp mgmt super.

GMC TRUCK DIV.: Lewis Campbell, vp-gm; Raymond Rota, genl sales mgr; Frederick Cook, dir-mktg; Warren Christell, dir-adv/business operations.

McCann/SAS, Troy, Mich. Candace Robbins, gm.

HUGHES AIRCRAFT CO.: Malcolm Currie, chmn-ceo; David Snyder, sr vp-mktg/intl; Lucius Gregg, staff vp-corp comms; Alma Gonzalez, mgr-corp adv.

Eisaman, Johns & Laws, Los Angeles. Dennis Coe, pres. Bernard Hodes Advertising, Los Angeles. Steve Petersen, sr vp-branch mgr.

OLDSMOBILE DIV: J.M. Losh, vp-gm; D.E. Lahti, genl sales/svc mgr; M.A. Grimaldi, genl mktg mgr; K.H. Ebben, dir-consumer mktg; D.H. Parkinson, strategic mktg mgr; G.W. Card, adv mgr; R.J. Romero, sales promo mgr.

Leo Burnett Co., Southfield, Mich. G. Ted Jordan Jr., sr vp-client svcs dir.

PONTIAC DIV: John Middlebrook, vp-gm; Elwood Schlesinger, genl sales/svc mgr; Joe Hendrix, genl mktg mgr; Lawrence Walter, sales promo mgr; Kenneth Robinson, adv/consumer mktg mgr.

D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich. O. Mark Gjovik, exec vp-grp acct dir.

SATURN CORP.: Richard LeFauve, pres; Donald Hudler, vp-sales/svc/mktg; Thomas Shaver, dir-mktg svcs.

Hal Riney & Partners, San Francisco. Hal Riney, chmn-ceo.

PRODUCT SAMPLES

SUNDAY NEWSPAPERS

NATIONAL FOUR-COLOR NEWSPAPER NETWORK SAMPLING PROGRAM!

- Hand delivery of a product sample in an imprinted bag with the home delivered Sunday newspaper
- Immediate impact on the market as your product is delivered all at one time
- One cost-effective rate includes product sampling and 1 and 1/2 ROP four-color pages for coupon or non-coupon ad
- Market-specific program gives you flexibility for national, regional or local buys
- Newly expanded National Four Color Newspaper Network ensures the best quality color reproduction for your ad
- One phone call, one order for ads and product samples, one rate, one set of materials and one bill.

Discover how the National Four Color Newspaper Network Product Sampling Program can help your products jump off the page and into the hands of your best prospects.

NATIONAL

NATIONAL FOUR-COLOR newspaper network

For all the details call [illegible], VP of Sales, at (212) [illegible] or [illegible], Sales Development Manager, at (312) [illegible]

An average Radio listener spends 3+ hours daily listening....
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NETWORK RADIO

[illegible]

RNA
Radio Network Association Inc
[illegible] Broadway, New York, NY [illegible]
212 765-8472

Top 25 network TV advertisers

Rank	Advertiser	Network TV spending 1990	1989	% chg
1	**General Motors Corp.**	$598.4	$506.5	18.1
2	**Procter & Gamble Co.**	556.1	446.8	24.5
3	**Philip Morris Cos.**	402.2	368.4	9.2
4	**Kellogg Co.**	301.3	324.8	(7.2)
5	**Sears, Roebuck & Co.**	253.8	197.1	28.8
6	**AT&T Co.**	244.9	162.7	50.5
7	**McDonald's Corp.**	231.0	252.1	(8.4)
8	**Johnson & Johnson**	211.4	169.9	24.4
9	**Ford Motor Co.**	196.9	201.4	(2.2)
10	**PepsiCo**	193.4	168.8	14.6
11	**Chrysler Corp.**	190.0	140.6	35.2
12	**Grand Metropolitan**	183.1	148.2	23.5
13	**Toyota Motor Corp.**	170.9	110.8	54.2
14	**Unilever NV**	162.9	190.4	(14.5)
15	**American Home Products Corp.**	150.5	156.0	(3.5)
16	**Nestle SA**	146.0	125.8	16.1
17	**General Mills**	142.9	145.0	(1.5)
18	**RJR Nabisco**	133.6	143.3	(6.8)
19	**Anheuser-Busch Cos.**	129.0	181.5	(28.9)
20	**Nissan Motor Co.**	125.8	73.4	71.3
21	**Bristol-Myers Squibb Co.**	124.4	131.7	(5.5)
22	**Honda Motor Co.**	119.0	101.0	17.8
23	**Eastman Kodak Co.**	116.5	137.5	(15.3)
24	**Warner-Lambert Co.**	91.1	100.8	(9.6)
25	**Coca-Cola Co.**	88.9	98.8	(10.0)

Note: Dollars are in millions. **Source:** LNA/Arbitron. See Page 71 for methodology and other source information.
AA chart: Kevin Brown

RANK: 57

Gillette Co.

Boston
Ad spending: **$181.7** million

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	17,354	26,728	(35.1)
Sunday magazine	0	264	NA
Newspaper	1,551	0	NA
Outdoor	29	6	357.2
Network TV	45,867	46,615	(1.6)
Spot TV	3,079	4,965	(38.0)
Syndicated TV	7,338	9,382	(21.8)
Cable TV networks	6,138	9,187	(33.2)
Network radio	575	495	16.2
Spot radio	195	137	42.4
Measured media	82,123	97,778	(16.0)
Unmeasured	99,600	87,300	14.1
Total	181,723	185,078	(1.8)
By top brands	**1990**	**1989**	**% chg**
Gillette shaving products	35,856	29,446	21.8
Braun shaving equipment	11,420	10,649	7.2
Right Guard deodorants	8,709	8,079	7.8
Oral-B	8,502	2,964	186.9
Soft & Dri deodorants	8,343	8,752	(4.7)

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	4,344	3,819	13.8
Earnings	368	285	29.3
U.S.	**1990**	**1989**	**% chg**
Sales	1,433	1,348	6.3
Profit from operations	262	219	19.8
Division sales	**1990**	**1989**	**% chg**
Blades & razors	1,571	1,238	26.9
Toiletries & cosmetics	941	1,036	(9.2)
Stationery prods	469	430	9.1
Braun prods	1,098	892	23.1
Oral-B prods	263	219	20.1
Other	3	4	(25.0)

CORPORATE PROFILE

Gillette Co. cut U.S. media spending in 1990 because its new Sensor shaving system had a more successful launch than anticipated, catching Gillette short on supply, company executives said.

After a sluggish first quarter 1991, Gillette was off and running again with Sensor, backed by $59.2 million in media and $5.7 million in sampling and couponing. Gillette supported Sensor in May and June with an $8 million direct-marketing campaign, its largest ever for a shaving product. The U.S. campaign included couponing and FSIs.

Early-year shipments of Sensor to the trade and initial consumer sales were weak in 1991, partly because of the economy and tighter retail inventories, said Prudential Securities VP Andrew Shore. Sensor sales have improved since April, however, and should reach $365 million by yearend, he said.

By the end of 1990, Sensor had a 9.3% share of the $840 million-plus U.S. wet-razor category. Gillette's total share for 1990 was 62.7%, up from 61%, followed by Warner-Lambert Co.'s Schick at 14.9%, down from 16.8%; Bic Corp.'s brands, 10.3%, up from 9.8%; American Safety Razor Co.'s brands, 2.4%, down from 2.7%; and Wilkinson Sword's brands, 1.4%, down from 1.6%.

U.S. sales of deodorants/antiperspirants decreased slightly, mainly from weaker sales of Dry Idea, offset by increases in the Right Guard Sport line extension. While Right Guard ad spending increased 7.8% to $8.7 million, spending for Dry Idea dropped from $3.5 million to $932,000.

HEADQUARTERS

Gillette Co./Prudential Tower Building/Boston, Mass. 02199/Phone: (617) 421-7000.

PERSONNEL, BRANDS, AGENCIES

ADVERTISING SERVICES DIV.: Michael Nadelberg, vp-mktg svcs; Louise Baranowski, mgr-media buying; Donald McAllister, mgr-media planning; John Walp, dir-adv prodn.

NORTH ATLANTIC GROUP: Bruce Cleverly, Peter Hoffman, Brian McFarland, vps-bus mgmt.

SHAVING USA: Robert Leger vp-sales/mktg; James Taffeirin, dir-mktg.

Sensor, Atra line, Trac II, Good News, Daisy: BBDO Worldwide, New York. Simon Marlowe, exec vp-sr mgmt rep.

PERSONAL CARE USA: Carole Johnson, vp-sales/mktg; J.D. Grinnell, dir-mktg.

Right Guard, Epic Waves: N W Ayer, New York. David Gantman, sr vp-exec acct dir.

Dry Idea, Soft & Dry: BBDO Worldwide, New York. Janet Presley, exec vp-dir acct.

STATIONERY PRODUCTS GROUP: Stephen White, vp-bus strategy, new prods/acquisitions; Jim Ricci, Anne Kelly, mktg mgrs.

Paper Mate, Waterman, Liquid Paper: McCann-Erickson Worldwide, New York. David Weiss, vp-grp head dir.

ORAL-B LABORATORIES: Thomas Farrow, gm-Consumer Prod. Div.

Ultra toothbrushes: BBDO, Los Angeles. Terry Bowman, sr vp-mgmt super.

BRAUN: Richard Cantwell, dir-mktg; Christina Steele, Robert Cronon, mktg mgrs; Alex McKinnon, Alex Resley, prod mgrs.

Braun: shavers, personal care, clocks, household prods: Lowe & Partners, New York. Dan O'Donnell, sr vp-mgmt super.

RANK: 59

Goodyear Tire & Rubber Co.

Akron, Ohio
Ad spending: **$178.7** million

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	14,880	11,118	33.8
Sunday magazine	4,073	596	583.0
Newspaper	1,832	18,630	(90.2)
Outdoor	36	180	(80.2)
Network TV	29,473	15,619	88.7
Spot TV	4,044	10,038	(59.7)
Syndicated TV	533	181	193.9
Cable TV networks	1,771	1,022	73.3
Network radio	14,223	6,139	131.7
Spot radio	8	3,230	(99.8)
Measured media	70,872	66,755	6.2
Unmeasured	107,800	101,500	6.2
Total	178,672	168,255	6.2
By top brands	**1990**	**1989**	**% chg**
Goodyear tires	57,990	43,419	33.6
Goodyear service store	11,109	18,309	(39.3)

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	11,273	10,869	3.7
Earnings	(38)	207	NA
U.S.	**1990**	**1989**	**% chg**
Sales	6,460	6,421	0.6
Operating income	327	491	(33.4)
Division sales	**1990**	**1989**	**% chg**
Tires, related	9,215	8,849	4.1
General products	2,027	2,009	0.9
Oil transportation	30	12	154.2

CORPORATE PROFILE

Goodyear Tire & Rubber Co., the top tire marketer in North America, is a battered giant in a beleaguered industry. The No. 2 player in the $50 billion worldwide tire market last year posted its first annual loss since 1932.

Fortunes continued to slip in first quarter 1991 when it lost $90.1 million. By the second quarter, earnings had regained steam, rising to $22.5 million, giving Goodyear reason to project a profit for the full year.

Several problems plague Goodyear. The car industry is in a slump. That's led to an oversupply of tires. Competition is fierce, with price-cutting paring profit margins. Goodyear is shackled by $3.8 billion in debt incurred in the mid-'80s when it fended off a takeover attempt.

Enter Stanley C. Gault. Just retired from Rubbermaid, Mr. Gault was hired by Goodyear last June as chairman-ceo, the first time since 1926 that Goodyear had brought in an outsider to run the company.

He is selling assets and holding the line on capital expenditures and on ad spending. There have been no new ads for tires this year until the fourth quarter, as Goodyear recycled tire ads created in 1990. Goodyear service centers have received a new campaign. Service store advertising in 1990 declined 39.3% to $11.1 million.

During 1990, Goodyear provided strong support for Goodyear branded car tires, spending $38.2 million, up 25%. This claimed a little more than half of Goodyear's total spending in media.

Goodyear planned to introduce four new products by yearend. Set for an introduction this month is a "green" tire, the Invicta GFE, which can cut fuel consumption by 4%. Other new products included a high-traction tire, a high-performance tire for Corvettes and a new light-truck tire. Goodyear is "considering" selling tires through discounters, a first for the marketer.

HEADQUARTERS

Goodyear Tire & Rubber Co./1144 E. Market St./Akron, Ohio 44316/Phone: (216) 796-2121.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Davis M. Jones, dir-brand adv; James A. Neawedde, brand adv mgr-high performance/racing tires; David A. Drown, brand adv mgr-broad mkt passenger/light truck tires; Paul F. Suloff, adv mgr-truck/farm tires; James T. Manning, mgr-genl prods adv; David A. Hanni, mgr-intl adv; Debra M. Walker, genl mktg mgr-retail; David A. Lenox, mgr-natl retail programs; David J. Morin, mktg mgr-adv sales plans/promos, retail stores.

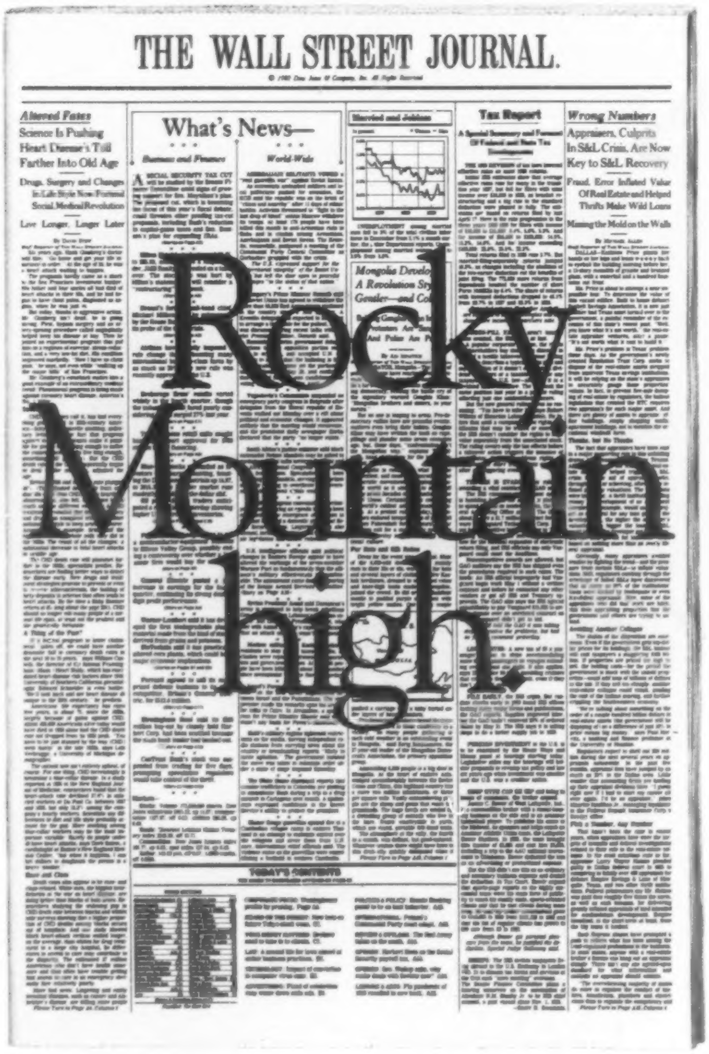
General productions, retail promo assignments: Malone Advertising, Akron, Ohio. Fred Bidwell, pres.

Goodyear tires-broad market, Eagle High Performance tires, Wrangler Truck tires, race enthusiast adv, commercial truck & farm tires, nat'l retail adv & services: J. Walter Thompson USA, Detroit. Chuck Balestrino, exec vp.

KELLY SPRINGFIELD TIRE CO. and LEE TIRE & RUBBER CO.: Jack Florin, dir-adv; Sharon Moore, mgr-sales promo; John Landers, mgr-retail fixtures; Steve Ketterman, mgr-retail adv.

Kelly tires: Marcus Advertising, Cleveland. Don Campbell, exec vp.

Lee tires: Winchell Marketing Communications, Philadelphia. Carl Shaifer, chmn-acct mgr.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Source: WSJ 1988 Worldwide Subscriber Study.
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RANK: 5

Grand Metropolitan

London

Ad spending: $882.5 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	76,706	69,413	10.5
Sunday magazine	4,083	4,595	(11.1)
Newspaper	6,372	7,465	(14.6)
Outdoor	8,443	7,560	11.7
Network TV	183,069	148,216	23.5
Spot TV	58,802	68,759	(14.5)
Syndicated TV	45,823	25,352	80.7
Cable TV networks	10,326	5,578	85.1
Network radio	0	3,795	NA
Spot radio	8,512	26,575	(68.0)
Measured media	402,136	367,307	9.5
Unmeasured	480,500	438,900	9.5
Total	882,636	806,207	9.5
By top brands	**1990**	**1989**	**% chg**
Burger King	177,589	175,423	1.2
Pearle Vision centers	44,153	31,152	41.7
Pillsbury mixes/baking pdts	31,248	17,981	73.8
Alpo cat food	21,256	2,666	697.3
Pillsbury breads & rolls	15,737	15,612	0.8
Green Giant vegetables	14,050	9,698	44.9
Absolut vodka	14,047	10,621	32.3
Smirnoff vodkas	9,608	10,734	(10.5)
J&B scotch	9,115	7,021	29.8
Alpo dog food	7,061	12,492	(43.5)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	16,616	15,567	6.7
Earnings	1,132	864	31.0
U.S.	**1990**	**1989**	**% chg**
Sales	8,025	6,228	28.8
Trading profit	840	661	27.0
Division sales	**1990**	**1989**	**% chg**
Food	[illegible],201	4,808	(33.4)
Drinks	5,306	4,661	13.8
Retailing	4,476	3,269	36.9

CORPORATE PROFILE

Grand Metropolitan in 1990 unleashed a flurry of [illegible] products, especially from its Pillsbury division, and moved this year to gain clout in network TV by consolidating network media buying.

D'Arcy Masius Benton & Bowles landed a plum this April when Grand Met consolidated $200 million in network TV buying at the agency. D'Arcy already handled Burger King Corp.'s buying; various shops had handled Pillsbury Co., Haagen-Dazs Co., Alpo Petfoods, Pearle Vision Centers and Heublein. Network TV accounted for about 46% of total media spending in 1990.

Franchisee disenchantment at Burger King led to the end of the "Break the rules" ad theme in April and resignation of Gary Langstaff, exec VP-brand strategy, this past February. The "Rules" theme was replaced with "Your way, right away," a variation on the 1970s' "Have it your way.'

Burger King added Newman's Own salad dressings in 1990 and continued in 1991 with Kool-Aid Kool Pops and Snickers ice cream bars. Burger King units also began [illegible] Domino's pizza and Weight Watchers low-cal products.

Burger King ranked second to McDonald's in the hamburger/sandwich market with a 16.9% share vs. 17.2% in 1989, according to *Nation's Restaurant News*.

Pillsbury introduced 50 new products, doubling the amount introduced in 1989. Ad spending on Pillsbury brand products grew 40% to $47 million.

The company remained third in the $1 billion baking mix category with a 22% share, behind General Mills' Betty Crocker line and Procter & Gamble Co.'s Duncan Hines brand.

Spending for Pillsbury's Green Giant Co. rose 44.9% to $14 million, with most of the increase coming in network and spot TV support for the vegetables lines.

Green Giant was second with a 12.6% share (up from 11.2%) in the $2 billion canned vegetable market in 1990, behind Del Monte's leading 15%, Information Resources Inc. reported. In the $1.8 billion frozen vegetable category, Green Giant's share rose 1.6 points to 15.3%, making the marketer a close second to the 16% held by Birds Eye, a Kraft General Foods brand. Haagen-Dazs in April got its first TV support ever as part of a $13 million campaign.

Heublein in 1990 became the leader of the 84.7 billion-case liquor market, unseating Jos. E. Seagram & Sons, according to John C. Maxwell Jr., analyst with Wheat, First Securities. Heublein gained 3.5% in volume to reach 14.3% of market; Seagram remained relatively flat at 13.8%. The new leader was aided by the 1989 acquisition of Christian Brothers and by the Jose Cuervo, Finlandia and Black Velvet brands.

Smirnoff vodka remained the industry's No. 2 spirit brand behind Bacardi Imports' Bacardi, with a 4.9% share, while Popov advanced one rung to third at 2.7%.

HEADQUARTERS

Grand Metropolitan PLC/11-12 Hanover Square/London W1A 1DP/England.

Grand Metropolitan Inc./200 South Sixth St./Minneapolis, Minn. 55402/Phone: (612) 330-4966.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ian A. Martin, chmn; Robert C. Lowes, exec vp-cfo.

ALPO PETFOODS: H. Robert Hawthorne, pres-Alpo; Kevin Martin, sr vp-mktg/sales.

Alpo canned & dry dog food, Alpo Dinner canned & dry dog food, Alpo [illegible] Bits, Alpo Light canned dog food, Alpo puppy food, Alpo Snaps treats, Alpo stew biscuits dog food, Bi-lo dog biscuits, Beef Bites treats, Tabby cat food: Weightman Inc., Philadelphia. Paul Burger, mgmt super.

BURGER KING CORP.: Fredy M. Dellis, pres-Burger King, Intl.; Robert J. Stetson, coo-Burger King USA.; Sidney J. Feltenstein Jr., exec vp-brand strategy; Denis Hitchmough, media dir.

Burger King brand identity: D'Arcy Masius Benton & Bowles, New York. Roy Bostock, pres.

Burger King brand retailing: Saatchi & Saatchi Advertising, New York. Edward L. Wax, ceo; Harvey Hoffenberg, exec vp.

PILLSBURY FOODS: Paul S. Walsh, div coo; Michael J. Paxton, pres-Bakery Prods. Div.; Gary Klingl, pres-Vegetable Grp.; Peter Thompson, div ceo, Haagan-Dazs Ice Cream; Ove Sorensen, pres, Haagen-Dazs Ice Cream/sr vp, Haagen-Dazs Intl; John Speirs, sr vp-mktg; Greg Lincoln, media dir.

Cakes/frosting mixes, Green Giant products, refrigerated products, Hungry Jack potatoes/pancakes, Pillsbury microwave products, Totino's pizza, Jeno's pizza: Leo Burnett USA, Chicago. John Miller, sr vp-grp acct dir. Campbell-Mithun-Esty, Minneapolis. Steve Gordon, sr vp-mgmt super. Foote, Cone & Belding, San Francisco. Kit Mill, sr vp-grp mgmt super. UniWorld Group, New York. Mark Robinson, vp-acct super.

Haagen-Dazs: BBDO Worldwide, New York. Jayne Evans, acct dir.

PEARLE HEALTH SERVICES: Joe Dono, sr vp-mktg; George Williams, vp-field mktg; Debbie Tippett, dir-mktg; Barbara Pijot, creative mktg mgr; Mary Lee Kilgore, media mgr.

Pearle Vision Centers, Texas State Optical Service: Foote, Cone & Belding, Chicago. Joan Black, sr vp-grp acct dir.

INTERNATIONAL DISTILLERS AND VINTNERS: G. William Seawright, pres-ceo; Roger Slone, sr vp-mktg; Anthony Foglio, sr vp-sales; Keith Greggor, brand dir-Bailey's Original Irish Cream; David Margolis, brand dir-J&B; Jamie Friedman, brand mgr-Malibu; Mark Teasdale, brand mgr-Amaretto di Saronno; John Skaviem, brand mgr-Romana Sambuca/Metaxa/Singleton; Geoff Ledger, asst brand mgr-Knockando; Julie Guettinger, asst brand mgr-Stubbs; Donald Van Wart, asst brand mgr-Rumple Minze, No. 12; Ron Melillo, asst brand mgr-Cinzano/Florio.

Bailey's Original Irish Cream liqueur, Cinzano vermouth, Sambuca Romana, Malibu Rum, Rumple Minze schnapps, Stubbs: Geer, DuBois, New York. Justin Parks, exec vp-grp acct dir.

Amaretto di Saronno, J&B rare scotch, Knockando scotch, Metaxa brandy: Grace & Rothschild, New York. Regis Albrecht, mgmt super.

CARILLON IMPORTERS: Michel Roux, pres-ceo; Dick McEvoy, sr vp-mktg/sales; Ernie Capria, vp-dir, mktg svcs; Pamela Taylor, dir-pr.

Absolut vodka, Absolut Pepper, Absolut Citron, Bombay gin, Fernet Branca, Grand Marnier, Piat D'Or wine: TBWA, New York. Richard Lewis, Brian Barry, vps-mgmt supers.

HEUBLEIN INC.: Martin Pazzani, John G. Martin, Bruce McDonnell, Ralph A. Hart, div mktg vps; Vince Murphy, Vanguard Div. mktg vp; George Scheppler, Fine Wines Div. mktg vp; Pat Wiley, Palace Brands Co. mktg vp; Charles Wheeler, dir-adv svcs.

Black Velvet Canadian whisky, Smirnoff Vodka, Smirnoff Silver Vodka, The Famous Grouse scotch whisky, Yukon Jack Canadian liqueur: McCann-Erickson Worldwide, New York. Rob McKinley, mgmt super.

Almaden wines, Almaden Blossom Hill, Christian Brothers wines, Finlandia vodka, Heublein Cocktails, Inglenook-Napa Valley wines, Inglenook Navalle wines, Jose Cuervo tequila, Lancers wine, Mouton Cadet wines, Truffles Liqueur de Chocolat: Goodby, Berlin & Silverstein, San Francisco. Colin Probert, mgmt super.

Christian Brothers Brandy: Waring & LaRosa, New York. Larry Weisberg, mgmt super.

Popov: D'Arcy Masius Benton & Bowles, New York. Dan Cole, acct super.

Hispanic adv: Smirnoff vodka, Lancers wine: UniWorld Group, New York. Winston Cooper, vp-mgmt super.

Black adv: Smirnoff Vodka: UniWorld Group, New York. Winston Cooper, vp-mgmt super.

LA OPINION
411 West Fifth Street, Los Angeles, CA 90013
(213) 896-230[illegible]

RANK: 72

Hallmark Cards

Kansas City, Mo.

Ad spending: $146.8 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	2,878	3,508	(17.9)
Sunday magazine	6,445	14,235	(54.7)
Newspaper	3,616	6,599	(45.2)
Outdoor	1	1	12.5
Network TV	56,628	43,292	30.8
Spot TV	6,317	3,851	64.0
Syndicated TV	8,877	5,320	66.9
Cable TV networks	658	824	(20.2)
Network radio	1,552	2,998	(48.2)
Spot radio	33	1,294	(97.4)
Measured media	87,005	81,917	6.2
Unmeasured	59,800	56,300	6.2
Total	146,805	138,217	6.2
By top brands	**1990**	**1989**	**% chg**
Hallmark stationery	71,641	62,039	15.5
Hallmark Christmas ornaments	7,118	5,205	36.7

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	2,500	2,500	0.0
Earnings	NA	NA	NA

CORPORATE PROFILE

Hallmark Cards is dealing itself into more ventures as it continues to grow beyond the mature greeting card market.

Although it remains the No. 1 card marketer in the $5.6 billion greeting card industry with a 45% market share, that business is relatively stable.

To compensate, Hallmark continues to build through acquisition. This year, the company bought a Dutch greeting card company and acquired more U.S. TV and radio interests.

The Shoebox Card line got its second short promotion in as many years this August. Hallmark brought out a version of its Just How I Feel card line to welcome back military personnel from the Persian Gulf War.

This holiday season Hallmark also is expanding substantially its line of holiday home decorating supplies, including more ribbons, bows and ornaments.

Mixed results came from several tests of new in-store products in 1990.

Hallmark last month ended a test of selling fresh flowers in a limited number of its 200 company-owned stores. Hallmark said it's now considering offering fresh flowers only in certain stores for holiday sales in 1992.

Its test of the Personalize It! in-store computerized greeting card service was successful, and Hallmark is rolling out the service in 11 Western states this month.

Hallmark this year discontinued the Gift of Choice customized gift catalog program it had been testing in 1990, citing unsuccessful [illegible].

Last March, the privately held company acquired a 98% interest in Crown Media, a new subsidiary it will use to acquire and operate communications properties including cable TV systems, broadcast TV and radio stations, and niche publishing companies.

In August, Crown made its first acquisition, buying several cable TV systems in Wisconsin.

HEADQUARTERS

Hallmark Cards/2501 McGee Trafficway/P.O. Box 419580/Kansas City, Mo. 64141-6580/Phone: (816) 274-5111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Thomas H. Johnston, grp vp-Hallmark brand; Laurie Beeson, vp-mktg, Hallmark brand; Robert Firnhaber, grp vp-Ambassador brand; Lanny Julian, vp-sales/retail devel; Homer Evans, vp/pres-Hallmark cards prod div; Buddy [illegible], vp-Hallmark specialty prods div; Mar[illegible]o, div vp-Ambassador prod devel; Bra[illegible] Moore, div vp-adv/promo; Ira Stolzer, adv dir.

Hallmark natl adv: Leo Burnett USA, Chicago. Jim Thompson, exec vp-acct dir.

Hallmark retailer adv programs, Ambassador cards: Valentine-Radford, Kansas City, Mo. Greg Kirsch, vp-acct grp super.

RANK: 54

Hasbro Inc.

Pawtucket, R.I.

Ad spending: $191.8 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	5,320	8,124	(34.5)
Sunday magazine	0	110	NA
Newspaper	0	282	NA
Network TV	52,217	42,424	23.1
Spot TV	63,024	86,881	(27.5)
Syndicated TV	24,340	37,426	(35.0)
Cable TV networks	11,143	7,816	42.6
Spot radio	24	0	NA
Measured media	156,068	183,063	(14.7)
Unmeasured	35,700	41,900	(14.8)
Total	191,768	224,963	(14.8)
By top brands	**1990**	**1989**	**% chg**
Hasbro toys	35,519	49,259	(27.9)
Milton Bradley games	27,299	25,443	7.3
Playskool toys	23,941	25,421	(5.8)
Coleco toys	8,791	7,040	24.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	1,520	1,410	7.8
Earnings	89	92	(3.2)
U.S.	**1990**	**1989**	**% chg**
Sales	939	954	(1.6)
Operating profit	64	100	(36.6)
Tonka sales	**1990**	**1989**	**% chg**
Sales	789	871	(9.4)
Earnings	(44)	6	NA

CORPORATE PROFILE

Hasbro is indisputably the biggest kid on the block in the $13.5 billion toy industry, following its May 1991 acquisition of troubled Tonka Corp.

The buyout provides Hasbro with an entire shelf of new toys that should improve its bottom line considerably.'

The $486 million deal brought together all of Tonka, Parker Bros. and Kenner Products' toys and games with the toy marketer's existing Hasbro, Playskool and Milton Bradley brands.

Tonka lost $44 million in 1990, com-

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pared with a gain of $5.7 million the previous year. Sales were $788.5 million, down 9.4%.

Tonka's media advertising dropped 31.3% to $50.8 million in 1990, compared with an 11.4% decline to $105.2 million at Hasbro. Spending in both 1989 and 1990 by the two companies has been consolidated in this report. The buyout by Hasbro brings its annual sales to more than $2 billion, a 14.8% share of the toy industry. It puts significant distance between Hasbro and archrival Mattel.

In August, the $6 million to $8 million broadcast TV account for Tonka's trucks and WWF Wrestling Buddies toys was consolidated at Griffin Bacal, the main agency for Hasbro brands. Grey Advertising, New York, previously handled Tonka. More agency consolidation is likely.

Hasbro's well-received Baby Uh-Oh from 1990 is being followed by Baby Oh-No and Baby Wanna Walk, two new special-feature dolls.

The Cabbage Patch Kids line has been broadened to include a battery-operated talking version; the special occasion Birthday Kids dolls include Preschool Kids, Kissin' Kids and Babyland Bunny.

HEADQUARTERS

Hasbro Inc./1011 Newport Ave./Pawtucket, R.I. 02861/Phone: (401) 727-5000.

PERSONNEL, BRANDS, AGENCIES

HASBRO DIV: Duncan Billing, sr vp-mktg; Ron Kos, sr vp-mktg svcs; Kirk Bozigian, vp-mktg, boys' toys; Jeanie Olsen, vp-mktg, girl's toys.

Hasbro toys, Tonka toys: Griffin Bacal, New York. Paul Kurnit, exec vp-creative dir.

Cabbage Patch Kids, My Little Pony: Jordan, McGrath, Case & Taylor, New York. Pat McGrath, pres; Don Weir, exec vp-girls' toys/Cabbage Patch Kids/boys' toys.

PLAYSKOOL DIV: Sh[illegible] Hartley, vp-mktg; Greg Miller, assoc vp-m[illegible] Gina Beebe, assoc vp-mktg.

Playskool toys: Griffin Bacal, New York. Paul Kurnit, exec vp-creative dir.

Print adv-Playskool: Kidvertisers, New York. Larry Nunno, acct dir.

PLAYSKOOL BABY DIV: Bob Stebenne, pres; Jonathan Breiter, vp-mktg.

Playskool baby products: Griffin Bacal, New York. Paul Kurnit, exec vp-creative dir.

MILTON BRADLEY DIV: Dale Siswick, sr vp-mktg; Gary Bergmann, vp-mktg; Cathy Meredith, assoc vp-mktg svcs.

Milton Bradley games: Griffin Bacal, New York. Paul Kurnit, exec vp-creative dir.

KENNER, PARKER BROTHERS DIVS:

Kenner Products, Parker Brothers: Grey Advertising, New York. Steve Dammers, Lou Maloof, exec vps-mgmt reps.

RANK: 3[illegible]

H.J. Heinz Co.

Pittsburgh

Ad spending: **$307.9** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	15,938	20,358	(21.7)
Sunday magazine	1,919	2,122	(9.6)
Newspaper	7,321	5,305	38.0
Outdoor	60	42	42.3
Network TV	53,255	61,329	(13.2)
Spot TV	29,505	26,706	10.5
Syndicated TV	16,531	27,153	(39.1)
Cable TV networks	2,259	3,789	(40.4)
Network radio	5,261	430	1,124.7
Spot radio	2,178	1,997	9.1
Measured media	134,227	149,231	(10.1)
Unmeasured	173,700	193,100	(10.0)
Total	307,927	342,331	(10.0)
By top brands	**1990**	**1989**	**% chg**
Heinz condiments	23,678	27,112	(12.7)
Ore-Ida vegetables	22,170	18,012	23.1
Weight Watchers frzn dinners	21,503	17,204	25.0
Weight Watchers Int'l	21,451	17,355	23.6
Weight Watchers desserts	6,150	8,542	(28.0)
9-Lives cat food	5,591	13,443	(58.4)
Heinz sauces	5,018	5,861	(14.4)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	6,647	6,086	9.2
Earnings	568	504	12.6
U.S.	**1990**	**1989**	**% chg**
Sales	3,863	3,780	2.2
Operating income	542	567	(4.5)

CORPORATE PROFILE

Competition in key categories, particularly weight loss and pet food, consumed H.J. Heinz Co.'s energies in its latest fiscal year.

Total marketing dollars weighed in at $616.1 million worldwide, up 6.3%, for the fiscal year ended May 1. Media spending in the U.S., down 10% to $134.2 million, covers calendar 1990.

This June, Heinz consolidated its Weight Watchers retail foods businesses into Weight Watchers Foods Co. Weight Watchers' weight-loss business remains part of Weight Watchers International.

Weight Watchers products, which received nearly $56 million in measured media support in 1990, down 9.7%, found intense competition in many categories.

In the hotly contested $3.4 billion total frozen-entree/dinner market, Weight Watchers stepped up media support for frozen entrees to $18 million. However, that 30% increase couldn't stem a 5-point slide to 6% in the fourth calendar quarter from 11% in the first, according to Information Resources Inc.'s InfoScan figures. For all of '90, Weight Watchers had an 8.2% share.

Weight Watchers responded to a push by ConAgra's Healthy Choice by reformulating its products to include lower cholesterol, salt and fat levels, and then refocusing marketing. Advertising shifted from the medicinal "We should have called them health watchers" TV campaign to focus on taste and variety.

Weight Watchers reformulated its entire ice milk line to be fat-free.

Weight Watchers International, with $1 billion in sal[illegible] the $8.2 billion overall weight-[illegible] business in the U.S. (including hospital programs) with a 12.2% share, according to Find/SVP.

The unit in July moved its $30 million account to Earle Palmer Brown Cos. from DDB Needham. A new campaign for the diet system will start this fall.

Heinz USA spent $13 million in a summerlong ad and promotion campaign for its flagship ketchup in 1991. The company hiked marketing support 25% from last summer's spending on ketchup, part of a $100 million increase (up 25%) in tis worldwide marketing budget.

Heinz's Ore-Ida Foods last year introduced two new varieties to its fried potato line: Golden Twirls and Zesties french fries. Ore-Ida potatoes now command a 47% share of the retail package-potato market.

Heinz Pet Products Co. dropped to No. 4 from No. 3 last year in the total $7 billion pet food category, behind Ralston Purina Co., Nestle's Carnation and Mars' Kal Kan lines. While Heinz's share slipped to 11.2%, Kal Kan rose to 12.4% on the strength of its new Pedigree dog food. Heinz made its first entry into the $300 million superpremium canned dog food segment last October with the rollout of Reward.

HEADQUARTERS

H.J. Heinz Co./P.O. Box 57/Pittsburgh, Pa. 15230-0057/Phone: (412) 456-5700.

PERSONNEL, BRANDS, AGENCIES

HEINZ USA: Consumer Products Mktg: Jeff Conner, Paul Olson, gms. Package Goods: Ben Fisher, vp; Bob Roussey, genl bus mgr; Barb Behrman, [illegible]. Foodservice: Jeff Berger, vp; Hank Lackard, gm. Technical Services: Doug Haines, vp; Mary Ann McCollough, gm-mktg svcs; Mark Shain, mgr-adv svcs.

Heinz Ketchup, Homestyle Gravy, Specialty Sauces, Beer Batt: Leo Burnett USA, Chicago. Sean Harrington, acct dir; John Hillman, acct exec.

Heinz 57 Sauce, Heinz Barbecue Sauce, Heinz Worcestershire Sauce, ALBA: Ketchum Advertising, Pittsburgh. Mark Hurst, dir-client svcs.

Heinz Vinegar: Regen Shore Inc., Scotch Plains, N.J. Ian Shore, ceo.

Chico San Rice Cakes: Hill, Holliday, Connors, Cosmopulos, Boston. Kathleen Driscoll, acct vp-grp head.

STARKIST SEAFOOD CO.: John A. Heil, vp-mktg/-sales; Mark [illegible], gm-trade mktg; Vince Daukas, prod mgr-trade mktg; Ray L. Wilkerson, gm-consumer mktg; Tom Brancky, mktg mgr-new bus devel; Matt Christenson, mktg mgr-light meat retail; Mary Kay Lee, prod mgr-albacore retail; Tom E. Sanford, gm-mktg/sales svcs; Bob Worsham, gm-special accounts/Canada; Don Gallagher, gm-retail sales; Joe P. Clancy, natl sales mgr.

Leo Burnett USA, Chicago. Jeff Herscovitz, vp-account dir.

ORE-IDA FOODS: Geoffrey V. Supko, vp-coo, Ore-Ida prods; J. Patrick Kinnay, vp-foodservice; Michael J. Tyler, gm-mktg; M. Vince Shaar, gm-sales; Jack L. Samaras, gm-new bus; Martin V. Thomas, mktg svcs.

DDB Needham Worldwide, New York. Lucille Schwartz, [illegible] super.

WEIGHT WATCHERS INTERNATIONAL: Barbara Warmflash, vp-mktg/devel; Wayne Perra, gm-field mktg; Linda Webb, gm-brand comms.

Earle Palmer Brown Cos., Bethesda, Md. Claire Geier, vp-acct grp dir.

WEIGHT WATCHERS FOOD CO.: Francis Florido, vp-frozen foods mktg; Lois Brown, gm-frozen foods mktg; Jay Abraham, gm-dry/dairy/novelty mktg; Linda Webb, gm-brand comms.

Weight Watchers Frozen Foods—entrees, breakfasts, desserts: DDB Needham Worldwide, N.Y. Rein Luik, exec vp/dir-client svcs.

Weight Watchers dry grocery, dairy, novelties, Brand Collection: Ally & Gargano, N.Y. Jim Hanzlik, sr vp-mgmt dir.

HEINZ PET PRODUCTS: Mike Milone, vp-mktg; Brian Mirsky, gm-cat food; Joe Roxstrom, gm-dog food; Ed Uebele, prod mgr, 9-Lives Crunchy Meals cat food; Rand Harbert, prod mgr, 9-Lives Tender Meals/Treats for cats; Mike Katz, prod mgr, 9-Lives Canned/Lean Entrees cat food; Chris Connolly, prod mgr-Amore cat food; Sue Dehner, prod mgr-Skippy Premium/Recipe dog food; David Rosenthal, prod mgr-Reward dog food; David Rhode, prod mgr-Meaty Bone dog biscuits; Marty Koppenhafer, prod mgr-Jerky Treats soft/chewy treats.

Reward dog food, Jerky Treats, Meaty Bone dog biscuits: Leo Burnett USA, Chicago. Rishad Tobaccowala, vp-acct super.

Skippy Premium dog food, Reward dog food: Goodby, Berlin & Silverstein, San Francisco. Debbie Nelson, acct super.

Media buying & planning: Skippy Premium dog food, Reward dog food: Media That Works, Cincinnati. Allison Hoffman, Beverly Rains, acct mgrs.

Amore cat food, 9-Lives cat food: Leo Burnett USA, Chicago. Rishad Tobaccowala, vp-acct super.

RANK: 73

Helene Curtis Industries

Chicago

Ad spending: **$145.4** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	23,109	16,540	39.7
Sunday magazine	65	0	NA
Newspaper	10	0	NA
Outdoor	310	0	NA
Network TV	56,623	37,343	51.6
Spot TV	1,379	1,014	36.1
Syndicated TV	11,747	5,804	102.4
Cable TV networks	2,408	1,225	96.5
Spot radio	568	102	458.6
Measured media	96,218	62,027	55.1
Unmeasured	49,200	31,700	55.2
Total	145,418	93,727	55.2
By top brands	**1990**	**1989**	**% chg**
Degree solid antiperspirant	19,903	0	NA
Finesse shampoos	19,157	3,301	480.4
Helene Curtis shampoos	14,444	15,527	(7.0)
Helene Curtis	13,368	916	1,359.7
Suave antiperspirants	7,342	7,298	0.6
Finesse hair products	7,161	3,961	80.8
Suave shampoos	5,266	5,111	3.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	867	691	25.5
Earnings	7	18	(62.9)
U.S.	**1990**	**1989**	**% chg**
Sales	640	534	19.8
Operating profit	45	49	(8.6)

CORPORATE PROFILE

The recession hasn't hurt Helene Curtis' sales growth, thanks to the successful launch of Degree antiperspirant and growth of its budget-price Suave personal-care line.

The estimated $50 million ad budget of Degree helped the heat-activated antiperspirant grab a 5.5% share of the $1.1 billion category within a year of its November 1989 launch, according to Kidder, Peabody & Co. figures.

Degree's launch follows Curtis' establishment of Suave antiperspirant, with a 3% share.

The company declared this July "Suave Month" and launched a $12.9 million marketing campaign for the personal-care line. The $5.1 million ad budget covers a heavier than usual TV and print schedule.

Two FSIs, a brochure with tips for living on a budget and extensive in-store merchandising were included.

Suave increased its share of the U.S. shampoo market to 8% by the fall of 1990 up from 7.5% at the beginning of the year, according to Kidder, Peabody. Curtis' other two big shampoos, Finesse and Salon Selectives, claim 4.5% and 4% shares, respectively.

To cash in on the shampoo-and-conditioner craze created by the success of Procter & Gamble's Pert Plus, Curtis launched Suave Shampoo Plus Conditioner in January.

The new products may have helped the company reach record sales of $867 million, but earnings suffered during 1990. The expense of introducing new products such as Degree in the U.S. and the sluggish economy hurt earnings as well as the shift in international sales, which increased the company's tax rate.

HEADQUARTERS

Helene Curtis Industries/325 N. Wells St./Chicago, Ill. 60610/Phone: (312) 661-0222.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Richard Frank, vp-mktg.

Suave: Bayer Bess Vanderwaker, Chicago. Dick Corelitz, exec vp.

Degree, Finesse, Salon Selectives: Saatchi & Saatchi Advertising, New York. Paula Forman, exec vp-exec mgmt dir.

RANK: 32

Hershey Foods Corp.

Hershey, Pa.

Ad spending: **$338.7** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	8,417	9,210	(8.6)
Sunday magazine	487	626	(22.1)
Newspaper	366	31	1,080.8
Outdoor	14	74	(80.8)
Network TV	52,220	41,454	26.0
Spot TV	18,822	12,957	45.3
Syndicated TV	14,456	13,938	3.7
Cable TV networks	3,696	3,306	11.8
Network radio	8,856	9,187	(3.6)
Spot radio	1,339	2,560	(47.7)
Measured media	108,680	93,342	16.4
Unmeasured	230,000	197,600	16.4
Total	338,680	290,942	16.4
By top brands	**1990**	**1989**	**% chg**
Hershey candies	39,124	30,888	26.7
Peter Paul candy bar	10,516	11,206	(6.2)
Reeses candies	9,666	6,828	41.6
Kit Kat candy bars	7,601	8,724	(12.9)
Cadbury candy	7,345	4,014	83.0
5th Avenue candy bar	7,038	8,160	(13.8)
York candy	5,188	6,629	(21.7)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	2,716	2,421	12.2
Earnings	216	171	26.2
U.S.	**1990**	**1989**	**% chg**
Sales	2,509	2,236	12.2
Income from operations	344	307	12.3

CORPORATE PROFILE

Hershey Foods Corp. has slowed its flow of major new national products in 1991 after generating record-setting sales and profits in 1990 that came amid reduced media spending.

This year Hershey has released its Desert Bar, a heat-resistant chocolate bar that was distributed to troops in the Persian Gulf. Plans for its future are under review.

Other new products headed for national introduction this year include new flavors for the Chocolate Bar Flavor Puddings and Chocolate Shoppe Toppings lines, and three new items for home bakers: Hershey's Butterscotch baking chips, Hershey's Holiday Vanilla Milk Chips in red, green and white, and Hershey's Sweetened Coconut Flakes.

Volume growth from Hershey Chocolate Bar Flavor Puddings, which completed their national rollout this year, and the Hershey Pasta Group more than made up for lower candy sales in 1991's first half, according to Hershey. Candy volume was hurt by a price hike in the chocolate bar price.

Hershey has been No. 1 among U.S. candy marketers since the Peter Paul/-Cadbury purchase in 1989. In 1990, retail sales of Hershey chocolate candy products through supermarkets were up 10%, according to Information Resources' InfoScan. Hershey was credited with a 42.8% share of the $1.35 billion market (in retail dollars) compared with Mars Inc.'s 34.5%.

The lead over Mars is smaller—39.7% to 38%—for chocolate products sold through candy and tobacco distributors, another important distribution channel, according to data for the year ended May 1991 from ICC Accutracks.

Recent additions include Hershey's Kisses with Almonds, introduced in August 1990, and Hershey's Chocolate Bar Flavor Puddings, now national following a late 1989 introduction. Hershey's chocolate drink in an aseptic package entered national distribution in January 1990.

In the $200 million retail refrigerated pudding category, Hershey's Chocolate Bar Flavor Puddings held a 12% share in 1990 before the brand was fully national, according to InfoScan. By the close of the first quarter of 1991, its share had expanded to 16%, it reported.

Caramello, a regional candy bar acquired in the Peter Paul/Cadbury purchase, was taken national in early 1990.

Hershey's purchase of the Ronzoni pasta business from Kraft General Foods moved Hershey Pasta Group in 1990 to a 25% share of the $1.01 billion retail pasta category, according to InfoScan. That was only three share points behind category leader Borden. Separately, Perfection pasta, a microwave pasta product, was withdrawn in 1990.

In the $160 million retail chocolate syrup/-toppings category, Hershey's genuine chocolate flavor syrup held a 43% share in 1990 and the new Chocolate Shoppe line a 3% share, according to InfoScan. In the $376 million baking chocolate, chip and cocoa category, Hershey held an 18% share, ahead of No. 3 Baker's (12.7%) but well behind Nestle/Toll House (51%).

HEADQUARTERS

Hershey Foods Corp./14 E. Chocolate Ave./P.O. 814/Hershey, Pa., 17033-0814/Phone: (717) 534-4000.

PERSONNEL, BRANDS, AGENCIES

HERSHEY CHOCOLATE U.S.A.: Jay F. Carr, vp-mktg; Anthony J. Pingitore, gm-special mkts; Michael H. Holmes, gm-grocery.

Cadbury products, Hershey's toppings, Hershey's chocolate flavored syrup, Hershey's chocolate milk mix, Hershey's Chocolate Bar Flavor puddings, Kit Kat bar, Luden's mentholated cough drops, Luden's throat drops, Mr. Goodbar, Reese's Pieces, Skor toffee bar, Whatchamacallit bar, Y&S candies, York peppermint patties, Symphony candy bars: DDB Needham Worldwide, New York. Peter Tate, exec vp.

Bar None, Big Block bars, seasonal shapes, 5th Avenue Bar, Giant Kiss, Golden Almond bar, Golden Almond Solitaires, Hershey's Kisses, Hershey's Kisses with almonds, Hershey's milk chocolate bar, Hershey's milk chocolate bar with almonds, Krackel bar, Hershey's baking chocolate, Hershey's chocolate chips, Hershey's cocoa, Hershey's Miniatures, Almond Joy, Mounds, Reese's peanut butter cups, Reese's crunchy peanut butter cups, Reese's peanut butter chips, Reese's Miniatures, Rolo: Ogilvy & Mather, New York. Michael Vaughn, sr vp-exec grp dir.

HERSHEY PASTA GROUP: Clifford K. Larsen, vp-mktg; Gary Lauerman, dir-mktg svcs.

American Beauty, Delmonico, Light 'N Fluffy, Pastamania, Perfection, P&R, San Giorgio, Skinner: Weightman Inc., Philadelphia. John McGeehan, acct super.

Ronzoni: Pedone & Partners, New York. Jim Coakley, acct super.

RANK: 36

Honda Motor Co.

Tokyo

Ad spending: **$318.0** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	61,291	56,656	8.2
Sunday magazine	846	926	(8.6)
Newspaper	10,563	7,884	34.0
Outdoor	813	264	207.8
Network TV	118,989	101,013	17.8
Spot TV	22,256	27,803	(20.0)
Syndicated TV	4,051	710	470.4
Cable TV networks	5,785	5,074	14.0
Network radio	0	44	NA
Spot radio	6,913	17,161	(59.7)
Measured media	231,507	217,534	6.4
Unmeasured	86,500	81,300	6.4
Total	318,007	298,834	6.4
By top brands	**1990**	**1989**	**% chg**
Honda cars	115,367	96,874	19.1
Acura cars	100,663	88,127	14.2
Honda motorcycles	9,848	10,139	(2.9)

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	30,507	27,326	11.6
Earnings	541	579	(6.6)
Division sales	**1991**	**1990**	**% chg**
Automotive	24,650	22,630	8.9
Motorcycles	3,756	2,905	29.3
Power equipment	2,102	1,790	17.4

CORPORATE PROFILE

After a decline in worldwide sales in 1990, Honda Motor Co. pledged it would go "back to the basics" in auto marketing. That means beefing up its limited product line while streamlining its operating divisions.

American Honda Motor Co., its U.S. subsidiary, posted record 1990 sales despite weakening in the compact segment.

U.S. unit sales of Honda in 1990 were 854,879 cars, including 138,384 of the luxury Acura models and 464,118 U.S.-built Accord and Civic cars, up 9.2%. This represented a 6.2% share of the total U.S. car/truck market, up from 5.4%, according to *Automotive News*.

Honda sold more than 950,000 cars in North America, or more than two cars for every one sold in Japan. It's aiming for 1 million units in 1991.

Honda's Accord accounted for total sales of 417,179 imported and U.S.-built cars, up 15%. For the second straight year, Accord was the best-selling car in the U.S.

The Honda lineup for 1991 included the Accord station wagon introduced in December. Honda expects to sell about 30,000 of the U.S.-built wagons in this country this year.

Going into the 1992 model year, Honda promised to re-establish momentum in the marketplace with a variety of all-new models. A new CRX sports model will bow next spring, but the big news was a new "breakthrough" car engine to be offered in the 1992 Civic models. The engine is EPA-rated at 48 mpg in the city and 55 mpg highway.

Measured media figures for 1990 show the Honda Accord with the biggest share of the corporate ad dollar, with an expenditure of $41 million, down 8.9%. Civic models accounted for an estimated $33 million, up 26%, and the CRX was pegged at $10 million, up 104%.

The Acura line of luxury autos claimed total media expenditures of $100 million, up 14%. LNA/Arbitron numbers for specific Acura products show the top-of-the-line Legend accounting for about $47 million in spending, up 17.5%, followed by the Integra at $29 million, down 22.5%, and the specialty NSX sports model around $12 million.

The April debut of the 1992 Acura Vigor, priced between $22,000 and $27,000, is expected to give the line additional momentum. Vigor will go head-to-head with the entry-level ES 250 Lexus, Mercedes-Benz 190E, BMW 325i and Mitsubishi Diamante, among others.

For 1991, Acura advertising focused on the line's performance, elegance and reputation for customer satisfaction. For the

the J.D. Power & Associates Customer Satisfaction Index.

Honda continued to maintain a small lead in the shrinking motorcycle market, finishing 1990 with a 29.4% share, up slightly from 29.3%. Nippon Gakki Co.'s Yamaha brand holds second place at 23.2%, followed by Harley-Davidson at 17.4%, Kawasaki Heavy Industries at 15.9% and Suzuki Motor Co. at 14.3%.

Honda motorcycles accounted for an estimated $6.6 million in media expenditures in 1990, up 10%. Honda scooters and ATVs (all-terrain vehicles) combined for another $4 million outlay.

Last month, Soichiro Honda, founder of Honda Motor Co., died at age 84.

HEADQUARTERS

American Honda Motor Co./100 W. Alondra Blvd./Gardena, Calif. 90247/Phone: (213) 783-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Honda autos: T. Okusa, exec vp. Acura: Edward R. Taylor, vp-sales; Eric Conn, sr auto adv mgr. Honda Motorcycle Div: John Petas, sr vp; Ray Blank, asst vp-mktg; Wayne Toyota, natl adv mgr. Honda Power Equipment Div: Shoichi Tanaka, Terry Mulligan, sr vps; John Lally, adv mgr.

Honda power equipment brands: Fahlgren Martin, Atlanta. Karen Estridge, acct super.

Honda autos: Rubin Postaer & Associates, Los Angeles. Chuck Valentine, sr vp-grp acct dir. Hispanic mktg: La Agencia de Orci, Los Angeles. Roberto Orci, sr vp.

Acura autos: Ketchum Advertising, Los Angeles. Craig Mathiesen, pres.

Honda motorcycles, scooters, ATVs: Dailey & Associates, Los Angeles. Dean Thompson, vp-mgmt super.

RANK: 82

Hyundai Group

Seoul, S. Korea

Ad spending: **$135.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	17,765	16,407	8.3
Sunday magazine	37	36	1.1
Newspaper	1,373	2,143	(35.9)
Outdoor	511	517	(1.0)
Network TV	31,169	41,118	(24.2)
Spot TV	32,530	22,462	44.8
Syndicated TV	8,346	4,397	89.8
Cable TV networks	1,068	933	14.5
Spot radio	3,753	11,246	(66.6)
Measured media	96,552	99,259	(2.7)
Unmeasured	38,700	39,800	(2.8)
Total	135,252	139,059	(2.7)
By top brands	**1990**	**1989**	**% chg**
Hyundai cars	94,357	93,964	0.4

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	40,250	32,200	25.0
Earnings	93	53	75.5

CORPORATE PROFILE

Despite U.S. unit sales declines of more than 25% in the last two years, Hyundai Motor America continues to expand its limited product lineup while rebuilding a struggling dealer organization.

Hyundai Motor, the U.S. sales arm and largest subsidiary of South Korea's Hyundai Group, expects to add 75 dealers by yearend to boost its U.S. tally to 550.

Next month Hyundai will start selling its third nameplate, the Elantra, a European-style subcompact.

Priced below $10,000, the front-wheel-drive, four-door Elantra falls between Hyundai's low-end Excel, base-priced at $6,375, and Sonata, at $10,900. Hyundai's other car is the Scoupe sport coupe, introduced last fall.

Hyundai's U.S. car sales totaled 137,448 units for 1990, down 25%, led by sales of 100,590 Excel models. The upscale Sonata accounted for 29,840, followed by Scoupe at 7,018, from four months. Total sales gave Hyundai a 1% share of the U.S. car/truck market, down from 1.3%, according to *Automotive News*.

Hyundai spent $96.7 million on media advertising in 1990, down 2.7% from 1989. The biggest share was claimed by the upscale Sonata at $31.3 million, down 36.1% from 1989, its first full year on the market. Excel got $30 million, down 17.8%, and Scoupe, $26.1 million.

With advertising designed to redefine Hyundai as a multiproduct car marketer moving upscale, the Scoupe became the centerpiece of the repositioning program. Ads spoke of its dependability, durability, performance, styling and value.

TV advertising again accounted for the biggest share of media expenditures in 1990, reaching $73 million, including an estimated $9.5 million on syndicated and cable TV. Magazines accounted for $18 million, the largest print expenditure in company history.

Media estimates from LNA/Arbitron exclude $9.5 million spending by local dealers, mostly in newspapers, spot TV and outdoor.

HEADQUARTERS

Hyundai Motor America/10550 Talbert Ave./Fountain Valley, Calif. 92728/Phone: (714) 965-3000.

PERSONNEL, BRANDS, AGENCIES

HYUNDAI AUTOS: Rod Hayden, exec vp-coo; Thomas Ryan, vp-mktg; Robert Clucas, adv mgr.

Backer Spielvogel Bates Worldwide, Irvine, Calif. Robert Svete, vp-acct super.

RANK: 71

IBM Corp.

Armonk, N.Y.

Ad spending: **$148.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	23,917	34,647	(31.0)
Sunday magazine	677	1,756	(61.4)
Newspaper	13,788	14,301	(3.6)
Outdoor	42	33	26.7
Network TV	31,996	41,053	(22.1)
Spot TV	937	714	31.3
Syndicated TV	156	43	265.0
Cable TV networks	1,617	706	128.4
Network radio	3,045	3,704	(17.8)
Spot radio	1,131	5,422	(79.1)
Measured media	77,306	102,381	(24.5)
Unmeasured	71,400	94,500	(24.4)
Total	148,706	196,881	(24.5)
By top brands	**1990**	**1989**	**% chg**
IBM computers	70,969	91,765	(22.7)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	69,018	62,710	10.1
Earnings	6,020	3,758	60.2
U.S.	**1990**	**1989**	**% chg**
Sales	27,132	25,745	5.4
Net earnings	1,459	(325)	NA
Division sales	**1990**	**1989**	**% chg**
Processors	16,433	16,236	1.2
Peripherals	13,190	11,458	15.1
Personal workstations	9,644	8,409	14.7
Other workstations	4,312	4,169	3.4
Software	9,952	8,424	18.1
Maintenance svcs	7,768	7,070	9.9
Other info technology	5,791	4,938	17.3
Federal systems	1,928	2,006	(3.9)

CORPORATE PROFILE

IBM Corp. Chairman John F. Akers wrote in the company's annual report last January that 1990 "was a good year for IBM," with "encouraging" results boosted by "the strongest lineup of products and services in our history."

Then in March, the company stunned Wall Street by announcing its first-quarter earnings would be about half that anticipated by company followers. In June, IBM said its second-quarter earnings would be worse than even pessimistic company followers had thought.

In between came Mr. Akers' now-celebrated spleen-venting to company managers, leaked to the media, in which he lamented: "The fact that we're losing share makes me goddamn mad."

The world's biggest computer maker is struggling as never before. IBM has blamed the recession and the disruption of the Persian Gulf War for its woes, but industry followers—and Mr. Akers' tongue-lashing—suggest the company itself deserves a large part of the blame.

Among other things, IBM has taken longer than anticipated to introduce a new generation of mainframe computers.

The company has fared relatively well in midrange computers and its RS/6000 line of workstations has been growing rapidly. But in personal computers, the fastest-growing market segment, leaner and nimbler rivals have been cutting prices aggressively, effectively reducing the market to a commodity-like business.

For 1991, "we see essentially a drop off the cliff" for IBM's worldwide market share, said Randy Brophy, product manager for *Yardstick*, a Gartner Group market-share analysis publication.

Gartner forecasts a 21.9% worldwide hardware market share for IBM in 1991. That would be down from 23.5% last year and the lowest market share in IBM history, Mr. Brophy said.

In the cutthroat PC business, Gartner projects a 22.4% IBM market share this year, down from 23.5% in 1990.

IBM reduced ad spending last year, particularly in corporate advertising, where media outlays dropped 43% to $18.2 million. Spending on large computer systems also fell sharply, by 36% to $6.4 million.

Spending on PCs jumped, however, largely because of a $10.4 million media push for the PS/1, IBM's first computer designed for the home market since its ill-fated PC Jr.

IBM continues to move aggressively in the $25.7 billion PC market. In March, it used a heavy ad blitz to launch a notebook version of its successful PS/2, and in June it introduced a number of new PS/2 desktop models, including one based on Intel Corp.'s newest microprocessor, the 486SX.

In addition, the company is expected to promote vigorously the newest version of its operating software, OS/2, when it's introduced in the fourth quarter. Sales of the existing version have been hurt by the Microsoft Windows 3.0 software of Microsoft Corp., formerly IBM's partner in developing OS/2.

In perhaps its most significant recent move, IBM announced in July an agreement with rival Apple Computer to develop jointly a new PC standard to succeed the now incompatible IBM PC and Apple Macintosh. That arrangement isn't expected to bear fruit until late in the decade, however.

HEADQUARTERS

IBM Corp./Old Orchard Rd./Armonk, N.Y. 10504/Phone: (914) 765-1900.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Mary Lee Turner, vp-comms; William Harrison, dir-adv/promo.

U.S. MARKETING & SERVICES: James Garrity, dir-adv.

Desktop products (PS/2, PS/1, RS/6000), desktop software, notebook computers: Lintas:New York. Stephen Norcia, grp exec vp.

Corporate adv, marketing image adv, mainframes, telecommunications, AS/400 computers & software: Wells Rich Greene BDDP, New York. D. Sklaver, grp exec vp-dir, acct svcs.

SYSTEMS INTEGRATION DIV: Susan Vucurevich, mgr-mktg comms.

Systems integration: Lord Dentsu & Partners, New York. Joe MacKenna, sr vp-mg dir, special mkts.

RANK: 83

ITT Corp.

New York

Ad spending: **$134.9 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	6,760	6,949	(2.7)
Sunday magazine	610	78	681.0
Newspaper	11,319	7,669	47.6
Outdoor	860	1,005	(14.4)
Network TV	8,917	5,014	77.9
Spot TV	10,256	9,953	3.0
Syndicated TV	0	2	NA
Cable TV networks	1,942	1,760	10.3
Network radio	1,635	1,277	28.0
Spot radio	397	333	19.3
Measured media	42,695	34,040	25.4
Unmeasured	92,203	94,500	(2.4)
Total	134,898	128,540	4.9
By top brands	**1990**	**1989**	**% chg**
Sheraton hotels	19,984	14,711	35.8
Corporate spending	9,986	6,997	42.7
ITT institutes	6,222	4,741	31.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	20,[illegible]04	20,005	3.0
Earnings	1,056	927	13.9
U.S.	**1990**	**1989**	**% chg**
Sales	14,106	14,278	(1.2)
Income	514	800	(35.8)
Division sales	**1990**	**1989**	**% chg**
Automotive	2,916	2,645	10.2
Electronic components	1,110	1,087	2.1
Fluid technology	1,057	960	10.1
Defense technology	1,612	1,580	2.0
Forest products	1,118	1,102	1.5
Insurance	8,836	8,689	1.7
Finance	1,896	1,806	5.0
Communications & info svcs	973	754	29.0
Hotels	832	782	6.4
Equity in Alcatel NV	213	167	27.5

CORPORATE PROFILE

Sheraton Hotels may be in the right place at the right time. The ITT Corp. subsidiary, in a joint venture with other U.S. and Soviet interests, is to begin operating two hotels in Moscow by 1993, with further expansion planned for the Republic of Estonia.

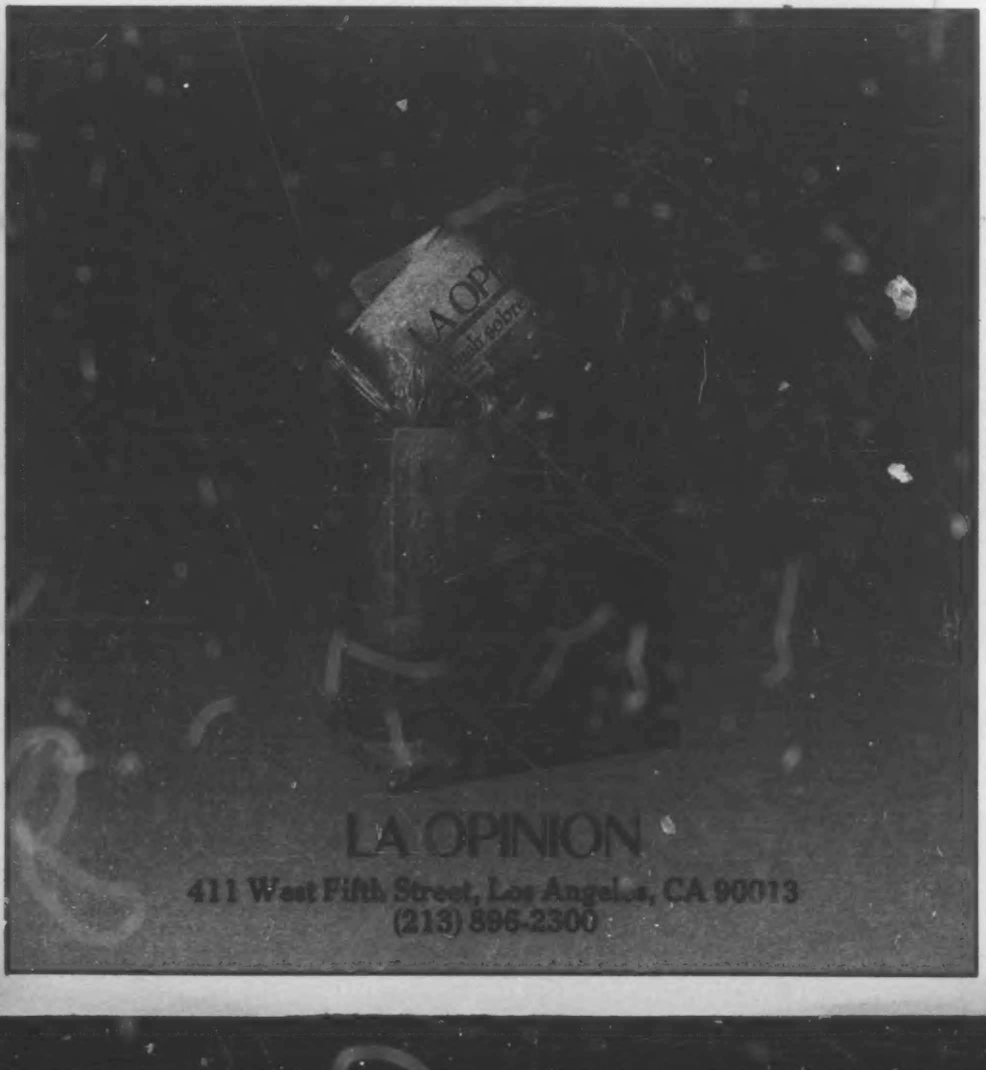
The international chain, which attracted 47% of ITT's U.S. media advertising last year, is betting on such expansion and an improved world economy to rebuild operating profit, which fell 67% to $39 million in 1990.

Sheraton properties for the most part are owned independently of ITT and are operated by Sheraton under lease or management agreements. ITT's 1990 revenue from Sheraton was $832 million, up 6.4%. Under its lease/management agreements, Sheraton's revenues represented only 17.3% of $4.8 billion in sales generated by all hotels under its jurisdiction.

Although ITT's media expenditures rose 25.4% last year, the company spends about three times that budget in unmeasured areas, such as business-to-business advertising and direct mail.

In March, Sheraton introduced its "Sheraton Endless Weekend" program with reduced rates and other amenities for families. Last year it advertised "Sheraton Fundays" and "Summer Fundays" value-added promotions for mini-vacations. The company continued Sheraton Club International, its frequent traveler program. Much of this activity is outside media advertising.

Hartford Insurance cut media spending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last year 30% to $4.2 million but is expected to rebuild its budget in 1991. The company withdrew from consumer auto insurance markets in certain states in 1990.

HEADQUARTERS

ITT Corp./1330 Avenue of the Americas/New York, N.Y. 10019/Phone: (212) 258-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Juan C. Cappello, sr vp-government/corp relations & adv; Steven A. Erenburg, dir-corp comms.

Corporate adv: Wells Rich Greene BDDP, New York. Frank Sampogna, exec vp-acct grp head.

ITT HARTFORD INSURANCE GROUP: John J. Daly Jr., asst vp-creative comms.

Hartford Insurance: McCaffrey & McCall, New York. Winifred Barnes, sr vp-mgmt super.

ITT SHERATON CORP.: Robert F. Cotter, sr vp-mktg.

Sheraton hotels: Wells Rich Greene BDDP, New York. Frank Sampogna, exec vp-acct grp head.

› RANK: 12

Johnson & Johnson

New Brunswick, N.J.
Ad spending: **$653.7** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	28,618	29,427	(2.7)
Sunday magazine	841	1,457	(42.3)
Newspaper	413	267	54.7
Outdoor	186	94	96.9
Network TV	230,818	179,410	28.7
Spot TV	20,333	15,944	27.5
Syndicated TV	35,790	19,150	86.9
Cable TV networks	9,827	7,127	37.9
Network radio	3,220	1,598	101.4
Spot radio	865	1,568	(44.8)
Measured media	330,910	256,042	29.2
Unmeasured	322,800	249,700	29.3
Total	653,710	505,742	29.3
By top brands	**1990**	**1989**	**% chg**
Tylenol pain releiver	91,745	76,488	19.9
Tylenol sinus capsules	42,544	20,857	104.0
Imodium AD	17,276	15,743	9.7
Stayfree feminine pdts	17,039	1,587	973.7
Reach toothbrushes	16,035	7,851	104.3
Acuvue contact lenses	11,715	9,397	24.7
Serenity Shield bladdr cntrl	11,283	3,088	265.4
Johnson's shampoos	10,040	11,871	(15.4)
Johnson's powders	9,756	5,539	76.1
Band-Aid bandages	8,063	10,124	(20.4)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	11,232	9,575	17.3
Earnings	1,143	1,082	5.6
U.S.	**1990**	**1989**	**% chg**
Sales	5,427	4,881	11.2
Operating profit	904	699	29.3
Division sales	**1990**	**1989**	**% chg**
Consumer	4,212	3,915	7.6
Pharmaceutical	3,303	2,652	24.5
Professional	3,717	3,190	16.5

CORPORATE PROFILE

Johnson & Johnson has shown with Tylenol how one can cut the cake many ways.

The multipurpose brand now represents a leading 30% of the $2.7 billion analgesic market and 40% of sales at Johnson & Johnson's huge U.S. consumer products segment. It spawned Tylenol Cold & Flu version last October, followed this April by Tylenol P.M., a sleep aid.

Added to late 1989 or early 1990 entries—Tylenol Cold, Tylenol Cold Night Time and Tylenol Allergy Sinus Medication—the Tylenol extensions helped push overall spending on the brand to $134.3 million, up 38%. The added-value entries have virtually rendered obsolete Tylenol "regular" strength, the old standby that received less than $100 in first-quarter 1991 ad support.

Media spending for the new Tylenol lines is expected to nearly double in 1991. An estimated $23 million in advertising will be spent on new Tylenol P.M. alone this year.

The Merck-Johnson & Johnson Consumer Pharmaceuticals Co. joint venture produced its first splash in 1990 with Mylanta antacid products. Mylanta drew $25.9 million in media spending, up 173%. The product held 11.7% of the $970 million antacid market in supermarkets and drugstores in April 1990.

Johnson & Johnson's position as leader in the $400 million baby toiletries market weakened as new competitors entered the field and No. 2 Mennen Co. and No. 3 S.C. Johnson & Son made aggressive pushes.

Johnson & Johnson over time has lost its lead in the baby bath segment, holding a 24% share to Mennen's 63%. And Mennen is creeping up on Johnson & Johnson's hold of the baby lotion segment, with a 40% share to Johnson & Johnson's 43%. Johnson & Johnson holds more than 50% of the $89 million baby shampoo market.

Johnson & Johnson's share of the general shampoo market slipped to 3.3% from 4.3% in 1989; ad spending fell 15.4% to $10 million.

The company leads the $88 million baby powder segment with a 63% share, and the $70 million baby oil segment with a 42% share.

Johnson & Johnson this April introduced Johnson's Baby Sunblock with a "No more tears" formula and an estimated $1 million in ad support. Spending for Sundown Sunblock plunged 93% to $216,000.

In 1990, Johnson & Johnson spent $24.6 million in measured media for its baby toiletries, up 17%. The company in 1990 ran spots using the tune "Take Good Care of My Baby" and positioning products for adult, child and infant use.

Johnson & Johnson jumped on the green bandwagon with advertising for o.b. non-applicator tampons. A $2 million effort helped boost Johnson & Johnson's unit share to 8.6% at the end of 1990, up 0.6 percentage points from the year before, even though ad spending was down 41.5%.

The Advanced Care Products division in March 1991 introduced Monistat 7 as an OTC yeast infection remedy, spending $15 million in its first three months.

Johnson & Johnson's McNeil Specialty Products Co. is waiting for FDA approval of its first product: sucralose, a non-caloric sweetener.

HEADQUARTERS

Johnson & Johnson/1 Johnson & Johnson Plaza/New Brunswick, N.J. 08933/Phone: (908) 524-0400.

PERSONNEL, BRANDS, AGENCIES

CHICOPEE: D.M. Lehman, vp-mktg, specialty products div; R.I. Munoz, vp-mktg, affiliate div.

ST&L Associates, New Brunswick, N.J. Howard Rich, acct exec.

CODMAN & SHURTLEFF: A.D. Stewart, vp-mktg; D.G. Williams, mgr-mktg comms.

Surgical equipment & supplies: Chalfin, Kostopulos & Gilmore, Boston. Barry Chalfin, acct exec.

ETHICON INC.: D.R. Murray, grp vp-suture/pharmacology prods; J.J. Bohan, vp-mktg, suture/pharmacology prods; D.M. Clapper, vp-mktg, endoscopic/mechanical prods.

Suture, stapling & endoscopy products, adhesion prevention products: Kallir, Phillips, Ross, New York. James Linzer, sr vp-mgmt super. Simms & McIvor, Somerville, N.J. Gene Hollen, exec vp-acct svcs.

JOHNSON & JOHNSON CONSUMER PRODUCTS: P.S. Michaels, vp-mktg; J.J. Gallagher, vp-sales.

Johnson & Johnson's: Baby Lotion, Baby Powder, Baby Oil, Baby Shampoo, Baby Sunblock, Swabs, Baby Washcloths, Medicated Diaper Rash Ointment, Dental Floss; Shower to Shower; Band-Aid Brand Bandages; Purpose; Act Fluoride Rinse; Reach; K-Y Jelly: Lintas:New York. Ned Russell, mgmt super. Young & Rubicam, New York. Claudia Rose, mgmt super. Cadwell Davis Partners, New York. Julie Treacy, mgmt super.

JOHNSON & JOHNSON MEDICAL: J.R. Maly, vp-mktg/sales, medical specialties div; J.D. Terry, vp-mktg/sales, sales admin; R.S. Tice, vp-mktg/sales, Surgikos Div.

Surgical packs & gowns, custom trays, wound care products, medical & surgical gloves, wearing apparel, disinfecting & sterilizing products, hemostasis products: Pierce-Davis & Associates, Arlington, Texas. Bill Pierce, pres.

McNEIL CONSUMER PRODUCTS CO.: J.T. Lenehan, pres; B.D. Perkins, vp-mktg; S.J. Fanning, vp-sales; G.A. Clements, dir-professional sales/mktg; E.C. Watson, dir-pr; G.E. Griffiths, dir-sales promo/comms.

Adult Tylenol, Children's Tylenol, Tylenol Cold, Tylenol Sinus, Children's Tylenol Cold: Saatchi & Saatchi, New York. R. Pounder, exec vp-[illegible] dir.

Imodium A-D, Lactaid: Lintas:New [illegible] J. Fine, exec vp.

PediaCare: Cadwell Davis Partners, New York. F. Cadwell, pres.

Sesame Street Vitamins: Susan Spindler Advertising, Weston, Conn. S. Spindler, pres.

Sine-Aid: Barrie Curtis Spies Creative Services, New York. B. Spies, pres.

Professional adv: Adult Tylenol, Children's Tylenol, Imodium A-D, PediaCare, PediaProfen, Tylenol Sinus: Kallir, Philips, Ross, New York. Kerri Hale, sr vp-mgmt super.

Lactaid: RWR Non-Prescription Advertising, New York. LeeAnne Pilson, sr vp-dir client svcs.

Clearasil: Klemtner Advertising, New York. Michael Trepicchio, exec vp-dir client svcs.

Hispanic advertising: Mendoza, Dillon & Asociados, Newport Beach, Calif. M. Gerdes, sr vp.

McNEIL PHARMACEUTICAL: C.E. Williams, vp-prod mgmt; J.C. Vaughan, vp-sales; T.L. Feldman,

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TheRadioBandofAmerica
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natl sales mgr; D.A. Wissner, exec dir-mktg svcs; T.L. Bishop, exec dir-prod mgmt.

Tylenol acetaminophen with codeine, Tylox oxycodone HCl and acetaminophen, Pancrease pancrelipase, Vascor bepridil hydrochloride: Botto, Roessner, Horne & Messinger, New York. Robert J. Botto, pres.

Haldol haloperidol, Parafon Forte DSC chlorzoxazone, [illegible]: Kallir, Philips, Ross, New York. Norman Cooper, pres.

Tolectin tolmetin sodium: Thomas G. Ferguson Associates, Parsippany, N.J. John F. Zweig, exec vp-coo.

ORTHO BIOTECH: Rich Zahn, vp-sales/mktg.

Orthoclone OKT-3: Kallir, Philips, Ross, New York. Jim Linzer, vp-acct super.

Procrit: Thomas G. Ferguson Associates, Parsippany, N.J. Maria Spellman, vp-acct super.

ORTHO PHARMACEUTICAL CORP.: Erick Milledge, vp.

Kallir, Philips, Ross, New York. Jim Linzer, vp-acct super.

DERMATOLOGICAL DIV: L.W. Riley, vp.

Professional dermatological products: Kallir, Philips, Ross, New York. Jim Linzer, vp-acct super.

ADVANCED CARE PRODUCTS DIV: Peter Gonze, vp-prod mgmt, nonprescription pharmaceuticals; Jill Lesko, franchise dir-consumer diagnostics.

Monistat 7 vaginal cream & suppositories, Fact Plus Home Pregnancy Test, Micatin antifungal products, Conceptrol contraceptives: McCann-Erickson Worldwide, New York.

JOHNSON & JOHNSON ORTHOPAEDICS: G.K. Kunkle, grp vp-sales/mktg/operations.

Surgical & non-surgical orthopaedic products: Simms & McIvor, Somerville, N.J. Gene Hollen, acct exec.

PERSONAL PRODUCTS CO.: P.N. Larson, chmn; G.M. Ostrov, pres; J. Rock, vp-mktg.

Stayfree: Saatchi & Saatchi, New York. Paula Forman, exec vp-exec mgmt dir.

o.b.: Cadwell Davis Partners, New York. Jamie Barrickman, sr vp-dir new bus.

RANK: 66

S.C. Johnson & Son

Racine, Wis.

Ad spending: **$158.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	9,257	14,099	(34.3)
Sunday magazine	58	706	(91.8)
Newspaper	1,336	472	183.1
Outdoor	670	389	72.3
Network TV	49,967	35,384	41.2
Spot TV	14,205	13,458	5.6
Syndicated TV	6,218	14,291	(56.5)
Cable TV networks	2,457	3,583	(31.4)
Network radio	6	676	(99.1)
Spot radio	2,430	4,614	(47.3)
Measured media	86,603	87,672	(1.2)
Unmeasured	71,500	72,400	(1.2)
Total	158,103	160,072	(1.2)
By top brands	**1990**	**1989**	**% chg**
Glade air fresheners	19,688	16,373	20.2
Johnsons polishes/wax	19,066	25,053	(23.9)
Raid insecticides	14,898	14,178	5.1
Halsa shampoos	10,386	2,028	412.1
Shout laundry stain remover	6,936	6,789	2.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	3,000	2,500	20.0
Earnings	NA	NA	NA

CORPORATE PROFILE

S.C. Johnson & Son is seeking a buyer for its personal-care lines, allowing the company to concentrate on items such as insect repellents and air fresheners.

The company reportedly almost eliminated its print ad spending for such products as Halsa and Agree shampoos, Edge shaving cream and Curel skin lotion in first quarter 1991.

Nevertheless, Johnson's Edge maintained its No. 1 spot in the $200 million shaving cream market, increasing its share to 32% in fall 1990 from 25.5% a year earlier, according to a Kidder, Peabody report. The growth came at the expense of Pfizer's Barbasol, with its share falling to 19.5% from 21.5%.

An early, wet spring and much flooding in early 1991 pushed up sales of insect repellents. In June, Johnson launched Off! Skintastic, which moisturizes skin with aloe while repelling bugs. A $2 million TV campaign, plus a sampling effort aiming to distribute 10 million packets, supported.

Also, Johnson anticipated higher sales for Ticks Off! for 1991. Distribution of the tick repellent, launched in 1990 on a limited basis, was stepped up where concern about Lyme disease is high. Johnson has a 50%-plus share of the $85 million insect repellent market, followed by Cutter, holding about 30%.

Other line extensions introduced since late 1990 include Raid Multi-Bug Trigger, Roach & Ant Trigger, Roach Baits and MAX Roach Baits; Off! Bug Barriers; Glade Potpourri Pump, Country Pottery, Plug-Ins; Pledge Dusters and Household Cleaners; Curel Sun Block SPF 8; Soft Sense Shave Gel Ultra Protection Formula and Skin Essentials; Fisher-Price Anitbacterial Liquid Soap, Wet 'n Dry Detangler and Baby Bath with Aloe; and Edge Aftershave.

In air fresheners, the company remained atop the $250 million category in 1990, on the basis of its 31% share from Glade Spray and 0.1% share for Glade II, according to Kidder, Peabody & Co. figures in late 1990. Its share has been sliding from 34% in fall 1989, as Renuzit from Bristol-Myers Squibb has advanced from 16% to 20%.

HEADQUARTERS

S.C.Johnson & Son/1525 Howe St./Racine, Wisc. 53403/Phone: (414) 631-2000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: J. Hutterley, dir-environmental affairs worldwide. Worldwide Consumer Products: W.D. Perez, exec vp-Consumer Prods, N. Amer.; W.D. George Jr., pres-coo; Dave May, dir-insect control bus; G. Montezemolo, vp-new mkts; L.L. Beebe, vp-sales; C.J. Goldthwaite, vp-personal prods; D.J. O'Neill, vp-home care.

Aveeno cleansing bar/bath lotion, [illegible] prods, 9-1-1 first aid line: Grant/Jacoby, Chicago. John Willie, vp-consumer packaged goods.

S.C. Johnson professional prods div: Grant/Jacoby, Chicago. Jim Head, sr exec vp, bus-to-bus grp.

Brite, Curel, Doctor Pine, Edge, Favor, Fisher Price children's toiletries, Future, Glad, Off!, Pledge, Raid, Shout, Soft Sense: Foote, Cone & Belding, Chicago. Paul Vernon, sr vp-grp acct dir.

Halsa, Agree: Foote, Cone & Belding, San Francisco. Richard Ward, sr vp-grp mgmt super.

RANK: 18

Kellogg Co.

Battle Creek, Mich.

Ad spending: **$577.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	8,497	9,001	(5.6)
Sunday magazine	343	73	369.2
Newspaper	233	337	(30.9)
Outdoor	26	29	(10.1)
Network TV	301,296	324,823	(7.2)
Spot TV	44,609	38,984	14.4
Syndicated TV	45,354	50,677	(10.5)
Cable TV networks	3,570	4,126	(13.5)
Spot radio	467	87	437.6
Measured media	404,393	428,135	(5.5)
Unmeasured	173,300	183,500	(5.6)
Total	577,693	611,635	(5.5)
By top brands	**1990**	**1989**	**% chg**
Kellogg's cereals	333,111	373,384	(10.8)
Kellogg's pastries	28,244	13,181	114.3
Kellogg's waffles	18,348	11,404	60.9
Eggo waffles & pancakes	15,775	11,703	34.8
Mrs. Smith's desserts	5,864	11,925	(50.8)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	5,181	4,652	11.4
Earnings	503	470	6.9
U.S.	**1990**	**1989**	**% chg**
Sales	3,044	2,941	3.5
Net earnings	325	313	4.1

CORPORATE PROFILE

Kellogg Co. devoted 1990 to getting its once-proud marketing machine back on track—and in early 1991, was rewarded with some early signs of success.

In deference to its sagging earnings and depressed market share, Kellogg cut media spending 5.5% in 1990 after beefing up ad spending by 42% over the previous five-year span.

Although 1990 dollar sales rose 11.4% to $5.2 billion, total U.S. cereal volume declined. Kellogg cut new-product activity, headquarters staff and expansion plans to compensate for the surprise drop.

Kellogg last year did the unusual. It began running ads comparing its cereals to competing brands. It test-marketed a product. And it focused anew on children's cereals.

The marketer took on comparative advertising for its Just Right cereal, hiking spending 59.9% to $19.9 million to position it against General Mills' Total.

While Chairman-CEO William LaMothe told Wall Street not to expect too much from the company in the near term, Kellogg went back to basics. Its new cereals, Bigg Mixx and Cinnamon Mini Buns, were aimed at children. Ad campaigns, like the $21.4 million spent for the first full year of Kenmei rice bran, focused again on good taste and basic nutrition, eschewing health claims.

Conscious that consumers were turned off by oat bran's health claims, Kellogg returned to promoting cereal as a good-tasting breakfast. It maintained spending for the good-taste advertising of Cracklin' Oat Bran but not for the "serious" Common Sense oat bran, whose spending fell 86% to $3.7 million. Frosted Mini Wheats' spending rose 28.2%, while its unsweetened cousin, Shredded Wheat Squares, watched its budget fall to $3.2 million from $15.8 million.

The company also acknowledged the FDA's stricter stance toward product claims and changed the controversial psyllium-based Heartwise cereal to Fiberwise. Kellogg has battled with the state of Texas, which claims Heartwise isn't a food but an unapproved drug, and is still awaiting the FDA's blessing on the safe use of psyllium in cereal.

At the same time, Kellogg was taking a page out of General Mills' book. Kellogg's most recent new item, Double Dip Crunch, enters the all-family, taste-oriented cereal market General Mills carved out in the 1980s. Double Dip Crunch, a honey-and-nut sweetened version of Crispix, began reaching supermarkets in August.

Kellogg's moves seemed to help stem its share losses. The company's leading share of the $7.2 billion ready-to-eat cereal market fell from 41.4% of pound volume in 1988 to 39.7% in 1989 and 37.5% last year. But in the first quarter of 1991, Kellogg's share swung back to 38.8%.

The company's most serious threat last year was the booming market for private-label cereals, most produced by Ralston Purina Co. Private label expanded its pound share of the category to 6.5% in 1990, up from 3.6% three years earlier.

Private-label products, marketed under a supermarket's own brand name, are largely aimed at Kellogg staples Raisin Bran, Corn Flakes and Sugar Frosted Flakes. Reflecting that, Kellogg boosted spending behind its core brands: Media spending for Corn Flakes was up 15.9% to $27.7 million, Sugar Frosted Flakes up 6.1% to $32.5 million and Rice Krispies up 4.9% to $19.3 million.

Kellogg dished out big spending increases for its non-cereal products. Spending behind the Pop-Tarts line rose 114% to $28.2 million. Pop-Tarts has 72% of the toaster-pastry market. Clearly, Kellogg continues to have growth expectations for portable breakfasts as a cereal-and-milk alternative; it also rolled national Nutri-Grain Cereal Bars.

Similarly, spending for the Eggo frozen waffle line rose 35% to $15.8 million. Eggo, which has boosted its share of market to 56.7% last year from 43.7% in 1987, added two new products: Eggo Mini's and Special K frozen waffles.

In December, Kellogg named 34-year company veteran Arnold Langbo president-chief operating officer, finally filling the vacancy created when the company ousted Horst Schroeder 15 months earlier. Mr. Langbo was president of Kellogg's international division and is expected to take over from Mr. LaMothe when he retires the end of this year.

HEADQUARTERS

Kellogg Co./One Kellogg Square/P.O. Box 3599/Battle Creek, Mich. 49016/Phone: (616) 961-2000.

PERSONNEL, BRANDS, AGENCIES

U.S. FOOD PRODUCTS DIV: G.E. Costley, corp exec vp-pres; C.M. Gutierrez, corp vp/exec vp-sales & mktg; J.R. Aubuchon, exec vp; C.A. Clark, vp/sr vp-nutrition & mktg svcs; S.W. Richards, sr vp-natl sales mgr; A.K. Hughson, vp-mktg; J.D. Wilson, vp-new prods/convenience foods.

All-Bran, Apple Jacks, Bigg Mixx, Cinnamon Mini Buns, Cocoa Krispies, Common Sense Oat Bran, Corn Flakes, Corn Pops, Cracklin' Oat Bran, Crispix, Double Dip Crunch, Fiberwise, Froot Loops, Frosted Flakes, Frosted Mini-Wheats, Honey Smacks, Just Right, Kenmei Rice Bran, Nut & Honey brands, Nutri-Grain cereal bars, Oatbake, Pop-Tarts, Product 19, Raisin Bran, Rice Krispies, Shredded Wheat Squares, Special K: Leo Burnett USA, Chicago. James Jenness, exec vp-acct dir.

Mueslix, Nutri-Grain cereals: J. Walter Thompson USA, Chicago. Jack Tuckey, sr vp.

Black consumer adv: Vince Cullers Advertising, Chicago. Vince Cullers, pres.

MRS. SMITH'S FROZEN FOODS CO.: J.J. Feeney, chmn-ceo; J.S. MacDonald, vp-genl sales mgr; K. Harlan, vp-mktg.

Eggo waffles, Mrs. Smith's frozen pastries: Leo Burnett USA, Chicago. James Jenness, exec vp-acct dir.

RANK: 9

Kmart Corp.

Troy, Mich.

Ad spending: **$693.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	55,343	35,565	55.6
Sunday magazine	6,566	8,322	(21.1)
Newspaper	80,059	58,444	37.0
Outdoor	60	59	2.4
Network TV	42,185	31,443	34.2
Spot TV	24,341	23,385	4.1
Syndicated TV	2,505	1,527	64.0
Cable TV networks	3,185	3,232	(1.4)
Network radio	10,970	13,588	(19.3)
Spot radio	4,804	10,810	(55.6)
Measured media	230,018	186,374	23.4
Unmeasured	463,200	375,300	23.4
Total	693,218	561,674	23.4
By top brands	**1990**	**1989**	**% chg**
Kmart stores general	85,822	55,538	54.5
Kmart stores	42,498	30,819	37.9
Kmart stores sport, toy, hobby	22,819	23,400	(2.5)
Kmart stores apparel	22,058	25,066	(12.0)
Builders Square home stores	21,646	12,856	68.3
Kmart stores automotive	12,670	9,833	28.8
Payless drugstores	5,995	7,142	(16.1)
Kmart stores drugs & toiletries	5,765	6,675	(13.6)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	32,070	29,533	8.6
Earnings	756	323	134.1
Division sales	**1990**	**1989**	**% chg**
General mdse	24,891	[illegible]	(0.3)
Specialty retail	7,179	4,917	46.0

CORPORATE PROFILE

Wal-Mart Stores may have passed Kmart Corp. last year, but to Kmart the retail war is just beginning.

Store modernization, specifically directed at the encroachment of customer-friendly Wal-Mart into its markets, is one of Kmart's key strategies.

It's part of a "renewal" program at Kmart that includes acquisition and growth in the specialty retail area, investment in retail automation, and focused advertising and promotions.

The nation's No. 2 retailer increased measured media spending by nearly $44 million in 1990, including a 56% increase in magazine spending. Last March, the retailer signed a multimillion-dollar magazine ad deal with *Newsweek* and nine Meredith Corp. titles.

Price cuts have slowed profits for two years, but the cuts are paying off in increased sales volume. Kmart eked out a 1.5% gain in profits in 1990, when a onetime restructuring charge of $422 million

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is folded into 1989 results.

Aided by the ongoing $2.3 billion interior image overhaul, Kmart plans to have 2,500 new-look stores by 1995.

Earlier this year, Kmart announced it will be expanding its project with Little Caesars Enterprises. By May 1992, 400 Little Caesars restaurants will be open within newly refurbished Kmart stores.

In early 1991, Kmart embarked on a multifaceted environmental campaign that includes tagging and promoting environmentally compatible products, educating employees and customers about products Kmart sells and their environmental impact.

In July, the company opened a Kmart Super Center in Medina, Ohio. The 150,000-square-foot store features general merchandise combined with a full-line supermarket, deli service counter and produce section. Kmart had earlier experimented with food sales in joint ventures but this store is the first entirely owned and operated by Kmart. Two more are planned.

Kmart's specialty retail sales were up 46% largely because of full-year results from PACE Membership Warehouse. Same-store sales were up 5.2% vs. 1.8% in 1989. PACE contributed $2.3 billion, up from only $383 million; Builders Square added $1.89 billion, up 5.6%; Pay Less drugstores, $1.64 billion, up 10.8%, and Waldenbooks, $1.1 billion, up 7.3%.

Kmart cut media spending 83.1% on Waldenbooks, boosted media 69.6% on Builders Square, and backed its new Sports Authority, with $3.2 million.

HEADQUARTERS

Kmart Corp./3[illegible]00 W. Big Beaver Rd./Troy, Mich. 48084/Phone: (313) 643-1000.

PERSONNEL, BRANDS, AGENCIES

KMART STORES: Bill Parker, vp-sales/mktg; Michael Wellman, vp-mktg; Gerald Habeck, vp-adv.

Kmart stores: Ross Roy, Bloomfield Hills, Mich. Peter Vetowich, exec vp-dir, retail operations.

Block consumer adv: Burrell Advertising, Chicago. Charles Curry, pres-coo.

WALDENBOOKS CO.: Sandra Long, sr mktg mgr.

Waldenbooks stores: CHC Advertising, Westport, Conn. Eric Tolkin, vp-acct dir.

BUILDERS SQUARE: Mark James, vp-mktg.

Builders Square stores: Ross Roy, Bloomfield Hills, Mich. Peter Vetowich, exec vp-dir, retail operations.

THE SPORTS AUTHORITY: William Lehrburger, dir-mktg/adv.

The Sports Authority stores: Ross Roy, Bloomfield Hills, Mich., Peter Vetowich, exec vp-dir, retail operations.

PAY LESS DRUGSTORES NORTHWEST: David Massing, vp-adv.

Pay Less drugstores N.W.: In-house.

PACE MEMBERSHIP WAREHOUSE INC.: Howard Jackson, vp-mktg.

PACE Warehouse stores: In-house.

Media buying: Reich Communications, Aurora, Colo. Christa Reich, pres.

RANK: 86

Kroger Co.

Cincinnati
Ad spending: **$131.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Sunday magazine	0	1	NA
Newspaper	30,535	19,336	57.9
Outdoor	899	865	3.9
Spot TV	26,028	29,870	(12.9)
Cable TV networks	38	37	1.9
Spot radio	1,596	2,575	(38.0)
Measured media	[illegible]	52,685	12.2
Unmeasured	72,000	64,100	12.3
Total	131,096	116,785	12.3
By top brands	**1990**	**1989**	**% chg**
Kroger food stores	49,658	43,684	13.7

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	20,261	19,104	6.1
Earnings	8	(73)	NA

CORPORATE PROFILE

As part of its far-ranging restructuring program, Kroger Co. decentralized its ad department this year to better tool advertising to regional food preferences.

The food chain, which incurred heavy debt in fending off two takeover attempts in 1988, has been streamlining operations and selling off non-core properties.

Decentralizing its marketing has allowed each of the 11 marketing regions to pick its own agency, primarily for TV advertising. The marketing areas already controlled newspaper advertising—an estimated 80% of stores' overall ad spending.

Success in retaining the account has been spotty for Campbell-Mithun-Esty, which has kept only the Nashville, Tenn., mid-Atlantic and Indianapolis regions. Cincinnati, Dallas, Houston, Atlanta and Columbus, Ohio, have moved their accounts.

The other regions have yet to review the account. Ad budgets now are based on regional sales.

Broadcast advertising, virtually all in spot TV, has been in transition. It slumped from 62% of total Kroger Food Store brand spending in 1989 to 44% last year, or $21.7 million, according to LNA/-Arbitron Multi-Media Service.

At the close of 1990, the company owned 1,255 supermarkets, up 1.7% from 1989. Last year, it purchased 29 Great Scott! supermarkets in Michigan.

Kroger was ranked No. 2 in sales nationally for 1990 by *Supermarket News*, behind American Stores Co., which had $22 billion in sales.

HEADQUARTERS

Kroger Co./1014 Vine St./Cincinnati, Ohio 45202/Phone: (513) 762-4000.

PERSONNEL, BRANDS, AGENCIES

KROGER FOOD STORES: Bob Phelan, Atlanta mktg area ad mgr; Harry McDaniel, Central area ad mgr; Steve Jagers, Cincinnati/Dayton area ad mgr; Dale Hollandsworth, Columbus area ad mgr; Marti Schirley, Dallas area ad mgr; David Chadwick, Delta area ad mgr; Gene Fanker, Houston area ad mgr; Ben Harper, Louisville area ad mgr; Ray Reed, Michigan area ad mgr; Eddy Yeatts, Mid-Atlantic area ad mgr; Ross Thomas, Nashville area ad mgr.

Kroger Food Stores-Central, Delta, Michigan, Louisville, Mid-Atlantic, Nashville areas: Campbell-Mithun-Esty, Chicago. Jay Kramer, acct super-Central/sr acct super-Delta & Michigan; Jim Atten, acct super-Louisville; George Isman, acct super, Mid-Atlantic/Nashville.

Kroger Food Stores-Cincinnati/Dayton area: Fahlgren-Martin, Cincinnatti. Jim Seifert, pres.

Kroger Food Stores-Houston area: Taylor Smith, Houston. Larry Taylor, chmn.

Kroger Food Stores-Dallas area: In-house.

Kroger Food Stores-Atlanta: Creative Consultants, Atlanta (TV/radio creative); Massotti's Media Services, Atlanta (media); Metier Marketing, Atlanta (planning) Phelan & Lowry, Atlanta (promos).

Kroger Food Stores-Columbus, Ohio: Hameroff/Milenthal/Spence, Columbus.

RANK: 65

Levi Strauss & Co.

San Francisco
Ad spending: **$158.9 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	8,389	1,663	404.6
Sunday magazine	5	384	(98.8)
Newspaper	32	0	NA
Outdoor	89	27	235.5
Network TV	22,019	24,622	(10.6)
Spot TV	10,472	6,481	61.6
Syndicated TV	12,200	7,815	56.1
Cable TV networks	12,672	9,473	33.8
Network radio	0	651	NA
Spot radio	184	80	130.5
Measured media	66,060	51,194	29.0
Unmeasured	92,800	71,900	29.1
Total	158,860	123,094	29.1
By top brands	**1990**	**1989**	**% chg**
Levi's apparel	60,096	49,488	21.4

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	4,250	3,630	17.1
Earnings	251	272	(7.7)

CORPORATE PROFILE

Levi Strauss & Co. is trying to offset faded denim sales by strengthening marketing efforts to develop, or revive, brand loyalty among men over 25, women, Hispanics and kids—groups outside its core customer base of young men.

The company attributed its record sales in fiscal 1990 to its international business and to the success of its Dockers brand, a $600 million non-jeans line of pants and other casual apparel that appeals to aging baby boomers.

While ad spending for Levi's flagship 501 jeans has remained constant around $20 million a year since 1985, the company has hiked spending for Dockers and for jeans outside the young men's market.

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Levi's spent close to $2 million to advertise Dockers on Super Bowl Sunday alone and is believed to be spending a total of $15 million to $20 million on advertising for Dockers this year.

Dockers will get strong competition this fall from rival VF Corp., which is launching a similar line of Timber Creek men's casualwear under the Wrangler brand umbrella and sold in discount stores. The Dockers line is sold primarily in department stores.

Dockers led the 91 million-unit men's casual pants market with an 11.2% share, up from 8.3% in 1989.

While Dockers gained share, Levi's has lost share in the overall jeans market, where it was still the brand leader in 1990 with a 19% unit market share, down from 21%.

To stop that market share slide, Levi's in 1991 broke its first campaign in two years for women's denim, and its first national Spanish-language jeans campaign, in addition to its advertising for 501s. The 501s effort again centers on a TV campaign directed by Spike Lee that shows "real" people in their 501s, plus special spots on the East Coast.

Levi's hasn't had much luck with its sporadic attempts at marketing to women, and the company has only a small share of the women's jeans category, dominated by Lee and Gitano Group.

Its new $12 million print and out-of-home campaign pairs the Levi's brand with Matisse-inspired renderings of the female form in blue jeans.

HEADQUARTERS

Levi Strauss & Co./Levi's Plaza/1155 Battery St./San Francisco, Calif. 94111/Phone: (415) 544-6000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Jim Chriss, vp-mktg; Linda Aletto, dir-consumer mktg; Maureen Moriarty, consumer mktg dir-men's jeans; Julie Palley, consumer mktg dir-youthwear; Steve Goldstein, consumer mktg dir-men's wear; Gordon Shank, consumer mktg dir-women's wear; Jim McCarty, consumer mktg dir-Brittania Sportswear.

Corporate adv, Levi's, Dockers, Brittania: Foote, Cone & Belding, San Francisco. Jack Rooney, sr vp-grp mgmt super.

Hispanic adv: Mendoza, Dillon & Asociados, Newport Beach, Calif. Eduardo del Rivera, exec vp-client svcs.

RANK: 56

Loews Corp.

New York

Ad spending: **$186.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	34,536	25,277	36.6
Sunday magazine	14,780	12,678	16.6
Newspaper	4,562	1,314	247.2
Outdoor	39,028	34,173	14.2
Network TV	3268	0	NA
Network radio	10,579	6,224	70.0
Spot radio	45	124	(63.4)
Measured media	103,852	79,797	30.1
Unmeasured	82,300	63,200	30.2
Total	186,152	142,997	30.2
By top brands	**1990**	**1989**	**% chg**
Newport cigarettes	52,390	48,760	7.4
CNA insurance	14,780	13,079	13.0
True cigarettes	12,681	7,901	60.5
Heritage cigarettes	10,909	0	NA
Kent cigarettes	9,991	6,102	63.7

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	12,637	11,437	10.5
Earnings	805	907	(11.3)
Division sales	**1990**	**1989**	**% chg**
Property, casualty insurance	7,517	6,736	11.6
Life insurance	2,426	2,336	3.9
Cigarettes	1,891	1,771	6.8
Hotels	240	207	15.9
Watches, timing devices	182	174	4.5
Shipping	125	60	108.7
Offshore drilling	41	15	172.4
Investment income	197	79	148.7
Equity in CBS Inc.	13	58	(78.3)
Other	6	(0)	NA

CORPORATE PROFILE

Loews Corp. worked over its cigarette lines in 1990, particularly its important Kent brand, and entered the industry's value-price market with Heritage. In the process, its media spending for cigarettes shot up 36.9% to $86 million.

Loews' Lorillard division remained the fourth-largest tobacco marketer in the U.S. Overall, Lorillard's market share dropped to 7.6% from 8% in 1989, returning it to its 1988 standing, according to John C. Maxwell Jr., analyst with Wheat, First Securities. Mr. Maxwell said the company's share was affected adversely by its decision to reduce incentives to the trade starting in late 1989.

Its full-price brands, which mimicked an industrywide category decline by dropping 4.4% in unit sales, accounted for 7.6% of overall market vs. 8% in 1989. Sales in the value-price brands dropped 3% as Lorillard's share dipped to 7.7% of the segment from 8%.

Eyeing the value-price segment, Lorillard introduced Heritage at midyear in Lights Filter King and Lights Filter 100s versions. Supported by $10.9 million in media spending and heavy couponing, Heritage achieved a 0.1% share of the overall market.

The company's two franchise brands—Newport and Kent—are in the declining full-price category. They accounted for 61% and 24%, respectively, of Lorillard sales in 1990.

Newport, the No. 5 cigarette among all categories and the third-place menthol, remained flat in 1990 at a 4.7% share despite a 7.4% growth in media advertising.

Advertising for Kent, which finished the year with a 1.8% share, down from 2.1% in 1989, got a 63.7% boost in media spending, a good part of that coming in the fourth quarter to combat a campaign from R.J. Reynolds Tobacco Co., which positioned its value-price Sterling smoke against full-price Kent.

Kent got a new campaign, bearing the theme "Portraits of pleasure," and redesigned packaging. True is undergoing reevaluation, according to the company, which has been unable to stop market share erosion that slips about 0.1 percentage point per year. The brand finished 1990 at 0.8%, down from 0.9%.

The company this May introduced value-price Style into test in New Orleans and Hartford, Conn., via Saatchi & Saatchi Advertising.

CNA Insurance ranked the eighth-largest insurance organization in the U.S. in premium income, boosted media spending 13%.

Loews owns 97% of Bulova, which introduced two lines last year, the Token fashion watch and Sportstime, a line of sports watches licensed by the NFL.

A highly targeted print and cable TV campaign supporting Bulova watches drew spending of $876,000 in 1990, up 34.6%. The company has begun a trade campaign to relaunch its Accutron line, to be followed by consumer print advertising in fourth quarter 1991.

Loews Hotels spent $1.7 million in media to advertise its 14 hotels and resorts, up 77% from 1989.

HEADQUARTERS

Loews Corp./667 Madison Ave./New York, N.Y. 10021-8087/Phone: (212) 545-2000.

PERSONNEL, BRANDS, AGENCIES

LORILLARD: M.L. Orlowsky, sr vp-adv/brand mgmt; G.R. Telford, vp-adv/brand mgmt; L.M. Giordano, media dir; R.G. Ryan, sales promo dir.

Newport, new products: Ally & Gargano, New York. Ed Ricci, exec vp.

Kent, Kent III, Kent Golden Lights, new products: Avrett, Free & Ginsberg, New York. Tom James, exec vp.

True, new products: Saatchi & Saatchi Advertising, New York. John Kaiser, exec vp.

LOEWS HOTELS: Charlotte St. Martin, exec vp-operations/mktg; Christopher Rockett, vp-mktg; Marian Succoso, vp-adv/sales promo.

Arias & Sarraille, Palo Alto, Calif. Lorilee Torrey, media dir.

CNA FINANCIAL CORP.: Peter P. Conway, sr vp-mktg; Susan Stockton, adv mgr.

Frank C. Nahser Inc., Chicago. Elizabeth Goebel, media super; Marty Kohr, vp-mgmt super.

BULOVA WATCH CO.: Philip Shaw, vp-mktg.

Weiss, Whitten Inc., New York. Jane Gundell, mgmt dir.

RANK: 43

R.H. Macy & Co.

New York

Ad spending: **$272.2 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	2,907	2,295	26.7
Sunday magazine	787	703	11.9
Newspaper	160,052	183,632	(12.8)
Outdoor	130	69	87.3
Spot TV	13,451	16,956	(20.7)
Spot radio	178	247	(27.8)
Measured media	177,503	203,902	(12.9)
Unmeasured	94,700	108,800	(13.0)
Total	272,203	312,702	(13.0)
By top brands	**1990**	**1989**	**% chg**
Macy's household	50,084	58,382	(14.2)
Macy's general	39,686	46,838	(15.3)
Macy's apparel	36,520	41,703	(12.4)
Macy's jewelry	10,163	12,052	(15.7)
I. Magnin apparel	9,050	5,761	57.1
Macy's drugs & toiletries	8,398	7,800	7.7
Bullocks apparel	7,573	10,735	(29.5)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	7,267	6,974	4.2
Earnings	(147)	(47)	NA

CORPORATE PROFILE

R.H. Macy & Co. is trying to boost sales with a new TV ad campaign as it works to reduce debt.

The recession hurt sales and earnings. Macy's reported sales for its fiscal year, which ended Aug. 3, fell 7% to $6.76 billion.

After a string of big losses, Macy's took out an ad in *Women's Wear Daily* in December 1990 to respond to rumors about the company's financial position. The ad drew a contrast between Macy's and Campeau Corp., the retailer that filed for bankruptcy protection, claiming Macy's had ample cash to meet its obligations.

In May, Macy's reported a $100.9 million loss for its third quarter and attributed the drop to the sluggish economy, the cost of investing in new technology and increased marketing efforts.

Some improvement began in the following quarter as sales rose 0.2%, the retailer's first quarterly sales gain after seven consecutive declines.

Last February, Macy's hired its first outside agency, Lintas:New York, for a corporate TV campaign promoting Macy's as a brand name. Macy's broke the campaign in April in the New York metro area; theme is "The magic of Macy's."

Macy's plans to roll out the campaign to all its markets and expects to be spending at the annual rate of $150 million by next spring. Macy's spent only $13.4 million in calendar 1990 on TV.

The move to increase TV came because "we know people aren't reading newspapers like they used to. But our audience does watch television," said Macy's Chairman-CEO Edward Finkelstein.

HEADQUARTERS

R.H. Macy & Co. Inc./151 West 34th St./New York, N.Y. 10001/Phone: (212) 695-4400.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Edward F. Finkelstein, chmn-ceo; Mark S. Handler, pres-coo; Myron E. Ullman, exec vp; Howard Adler, sr vp-sales promo/mktg; Arthur Reiner, chmn-ceo, Macy's New York; Robert Friedman, vice chmn-Macy's Northeast; Hal Kahn, ceo-Macy's South/Bullock's; Rudolph Borneo, pres-Macy's California; Rose Marie Bravo, chmn-ceo, I Magnin & Co.

Corporate: Lintas:New York. Tony DeGregorio, grp exec vp-exec creative dir.

Macy's Northeast: In-house. Steven Kornajcik, sr vp-sales promo; Nan Cooper, Audrey Nizen, Robin Hall, Alan Spett, adv admins.

Macy's South/Bullock's: In-house. Joseph Garberino, sr vp-sales promo; Joe Traynor, grp vp; Karen Martin, vp-adv bus office.

Macy's California: In-house. Greg Hribar, sr vp-adv/sales promo.

I. Magnin & Co.: In-house. Wilmer Weiss, sr vp-comms; Viginia Ferrand, vp-adv; Carolyn Galliani, adv mgr.

RANK: 78

Marriott Corp.

Washington

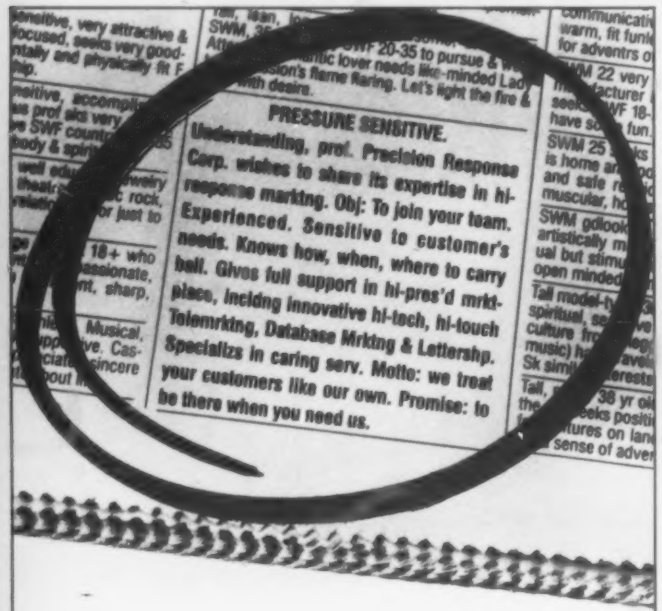
Ad spending: **$139.6 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	8,659	8,191	5.7
Sunday magazine	224	607	(63.2)
Newspaper	16,220	10,687	51.8
Outdoor	1,442	1,261	14.3
Network TV	0	1,843	NA
Spot TV	10,188	11,436	(10.9)
Syndicated TV	0	10	NA
Cable TV networks	1,458	1,533	(4.9)
Network radio	5,987	3,419	75.1
Spot radio	7,012	3,654	91.9
Measured media	51,189	42,641	20.0
Unmeasured	88,400	73,600	20.1
Total	139,589	116,241	20.1
By top brands	**1990**	**1989**	**% chg**
Marriott hotels	27,644	19,985	38.3
Courtyard hotels	7,098	2,907	144.1
Bob's Big Boy restaurants	6,959	4,167	67.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	7,646	7,536	1.5
Earnings	47	177	(73.4)
Division sales	**1990**	**1989**	**% chg**
Lodging	3,942	3,546	11.2
Contract services	3,704	3,990	(7.2)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CORPORATE PROFILE

For Marriott Corp., 1990 wasn't a very good year. Loaded down with $3.5 billion in debt, the fast-food and hotel operator initiated a construction moratorium on lodging for the elderly and hotels, and moved ahead on its plan to get out of restaurants.

The reason for the reversal of fortune at Marriott and its rapid scrambling is debt. Despite 1986 changes in federal tax laws that reduced the appeal of limited partnerships, Marriott continued to build hotels until 1989, when both the real estate and credit markets crashed.

While the company continues to sell off hotels and restaurants, continuing operations pulled strong ad support of $51.1 million, up 20%. That spending doesn't include media support for Roy Rogers Restaurants, sold in January 1990 to Hardee's Food Systems.

At yearend, the company had 223 Marriott hotels, resorts and suite-hotels in 17 countries. Its moderate-price hotel chain, Courtyard by Marriott, included 178 hotels at yearend. There were 163 Residence Inns and 75 budget-price Fairfield Inns.

Sales of such restaurant properties as Bickford's Family Restaurants and Howard Johnson's continued during the year, but Marriott ended 1990 with more than 400 still under its wing.

Despite the company's growing financial pressures, it upped ad spending for its Marriott Hotels and Residence Inns. Spending for the Marriott brand jumped 38.3% to $27.6 million, while ad spending for Residence Inns jumped 51%.

HEADQUARTERS

Marriott Corp./10400 Fernwood Rd./Bethesda, Md. 20058/Phone: (301) 380-9000.

PERSONNEL, BRANDS, AGENCIES

LODGING OPERATIONS: Robert Bloch, sr vp-mktg, hotels; Jacqueline Hurley, dir-natl adv/field mktg, hotels/resorts/suites; Bob McCarthy, vp-mktg, Fairfield Inns.

Marriott hotels, resorts, suites: FCB/Leber Katz Partners, New York. Dorian Rogers, acct exec.

Residence Inn: Martin Agency, Richmond, Va. Dan Bartges, vp-acct super.

Courtyard: Scali, McCabe, Sloves, New York. John Bowen, acct exec.

Fairfield Inn: Eisner & Associates, Baltimore. Peter Gladstone, vp-acct super.

RESTAURANT OPERATIONS: Paul Johnson Jr., exec vp-gm; Doreen Levin, dir-mktg.

Morey & Waddell, Indianapolis. Cheryl Bohn, acct exec.

RANK: 42

Mars Inc.

McLean, Va.

Ad spending: **$272.4** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	3,532	6,957	(49.2)
Sunday magazine	0	1,036	NA
Newspaper	837	562	48.9
Outdoor	272	0	NA
Network TV	69,726	77,098	(9.6)
Spot TV	39,002	33,551	16.2
Syndicated TV	23,000	22,284	3.2
Cable TV networks	10,400		(25.6)
Network radio	657	3,872	(83.0)
Spot radio	1,385	890	55.5
Measured media	148,817	160,233	(7.1)
Unmeasured	123,600	133,100	(7.1)
Total	272,417	293,333	(7.1)
By top brands	**1990**	**1989**	**% chg**
M&M's candies	14,017	11,840	18.4
Uncle Ben's rice	13,140	15,603	(15.8)
PB Max candy bar	12,146	0	NA
Skittles	11,122	9,082	22.5
Whiskas cat food	10,456	18,653	(43.9)
Kal Kan dog food	10,286	13,976	(26.4)
Bounty candy	9,965	7,726	29.0
Mars candy bar	9,746	3,629	168.6
Snickers candy bar	8,939	14,562	(38.6)
Twix	8,844	10,430	(15.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	8,000	8,000	0.0
Earnings	NA	NA	NA

CORPORATE PROFILE

Mars has aggressively built share in its candy/snack and pet food markets even as it cut media spending for the third consecutive year.

Measured media support was up last year at the M&M/Mars candy and snack division, but off at the Kal Kan Foods pet food, Uncle Ben's rice and Dove International frozen novelties units.

Mars is a major spousor of the 1992 Olympics, and spending on event-related promotions and sponsorships is likely to shift spending from media in '92.

M&M/Mars, No. 2 to Hershey Foods Corp. in the $8.7 billion (wholesale) U.S. confectionary business, has closed the gap in sales through candy and tobacco wholesalers, though it still trails Hershey in sales through supermarkets.

For the year ended May 1991, Mars is credited with a 38% share of chocolate product sales through candy and tobacco wholesalers, a 2.5 share point gain over the same period a year earlier, according to ICC Accutracks. Hershey held a 39.6% share.

In supermarkets during calendar 1990, M&M/Mars, with a 34.5% share of retail chocolate product sales, trailed Hershey by 8 share points, according to Information Resources Inc.'s InfoScan service.

Though M&M/Mars spent heavily in 1990 on PB Max, a new peanut butter-based product, two of its biggest hits were line extensions, Peanut Butter Snickers and Milky Way Dark, which ranked 16th and 17th in wholesale sales, according to Accutracks.

Dove chocolate bars were launched this year in selected markets as a premium entry in the $1.2 billion solid chocolate bar market. Dove International has introduced Snickers, Three Musketeers and Milky Way ice cream bars. The Snickers ice cream bar quickly became a top 10 seller in the crowded frozen novelties market, according to Nielsen Marketing Research.

Kal Kan boosted its retail share for the third consecutive year in 1990, to 12.5%, according to Wheat, First Securities. Sales gains elevated Kal Kan Foods into third place among pet food marketers—behind Ralston Purina Co. and Nestle—regaining a position it lost in 1987, reported Wheat First.

In a major broadening of the Pedigree and Whiskas lines, Kal Kan in 1991 is spending $50 million to establish a new superpremium-price line extension, Pedigree Expert Diet dog food and Whiskas Expert Diet cat food.

Mars' Uncle Ben's unit saw retail sales of its dry rice and rice mixes slip 2% in 1990, while its leading share of the dry rice/rice mix category was 24%, according to InfoScan data. Category sales were up 4.5% in 1990 to $863.9 million.

Uncle Ben's this year is trying to take its high-quality image into other supermarket sections. It's testing in Denver a line of add-meat chunky vegetable sauces that can be poured over pasta or rice.

HEADQUARTERS

Mars Inc./6885 Elm St./McLean, Va. 22101/Phone: (703) 821-4900.

PERSONNEL, BRANDS, AGENCIES

M&M/MARS DIV: MaryAnn Donovan, sr vp-mktg; Alfred Poe, sr vp-sales.

M&Ms, Snickers, Three Musketeers, Kudos, Starburst, Holidays, PB Max, new products: Backer Spielvogel Bates Worldwide, New York. Jerrold Gottlieb, exec vp-acct mgmt.

Bounty, Milky Way, Mars Almond Bar: D'Arcy Masius Benton & Bowles, New York. Lori Moskowitz, vp-dir, operations & strategy.

Combos, Munch, Skittles, Twix, new products: D'Arcy Masius Benton & Bowles, St. Louis. Rick Spatz, sr vp-grp acct dir.

Dove chocolate bars: Grey Advertising, New York. Warren Fisher, sr vp.

KAL KAN FOODS: John Murray, vp-mktg/sales.

Pedigree dog food, Whiskas cat food, Sheba cat food, Pedigree Expert Diets, Whiskas Expert Diets, new products: Backer Spielvogel Bates Worldwide,

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New York. Norman Bierman, exec vp-acct mgmt.

UNCLE BEN'S INC.: Michael Owen, franchise dir.

Branded white rices, branded prepared rices, Uncle Ben's Cookin' Sauces, new products, foodservice div: Backer Spielvogel Bates Worldwide, New York. Alice Uniman, sr vp-mgmt rep.

DOVE INTERNATIONAL: William Del Chiaro, vp-mktg.

Dove ice cream bars, Rondos bite-size ice cream snacks: Grey Advertising, New York. Warren Fisher, sr vp.

Milky Way ice cream bars/milk shakes: D'Arcy, Masius Benton & Bowles, New York. Lori Moskowitz, vp-dir, operations & strategy.

Snickers ice cream bars, Three Musketeers ice cream bars: Backer Spielvogel Bates Worldwide, New York. Jerrold Gottlieb, exec vp-acct mgmt.

RANK: 33

Matsushita Electric Industrial Co.

Secaucus, N.J.

Ad spending: **$330.2 million**

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	26,408	19,718	33.9
Sunday magazine	32	34	(7.6)
Newspaper	33,032	28,928	14.2
Outdoor	4,030	3,855	4.5
Network TV	42,711	46,966	(9.1)
Spot TV	39,481	39,250	0.6
Syndicated TV	8,070	5,826	38.5
Cable TV networks	4,740	5,007	(5.3)
Network radio	506	410	23.3
Spot radio	5,963	757	687.8
Measured media	164,972	150,751	9.4
Unmeasured	165,200	150,900	9.5
Total	330,172	301,651	9.5
By top brands	**1990**	**1989**	**% chg**
Universal City Studios	110,022	105,393	4.4
Universal Studios tours	11,121	5,873	89.4
MCA home video & discs	11,065	9,511	16.6
Panasonic video equipment	8,286	9,046	(8.4)

SALES & EARNINGS ($ in millions)

Worldwide	**1991**	**1990**	**% chg**
Sales	46,804	42,573	9.9
Earnings	1,836	1,671	9.9
U.S.	**1991**	**1990**	**% chg**
Sales	5,400	NA	NA
Operating income	NA	NA	NA
Division sales	**1991**	**1990**	**% chg**
Video equipment	12,162	11,335	7.3
Audio equipment	4,240	3,979	6.6
Home appliances	6,379	5,691	12.1
Communications, industrial equipment	11,017	9,751	13.0
Electronic components	5,969	5,540	7.7
Batteries & kitchen-related	2,478	2,213	11.9
Other	4,558	4,063	12.2

CORPORATE PROFILE

Matsushita Electric Industrial Co., which is looking at Universal Pictures to provide the software for its growing consumer electronics products, has found the studio's fortunes in a slide.

A sharp drop in profits has been the immediate effect of its $6.13 billion purchase of MCA Inc. last December. In fiscal 1991 first quarter ended June 30, net earnings fell 34% on sales growth of 12.3%. The previous-year period did not include MCA.

Universal Pictures, a former MCA unit, ended 1990 ranked third in film rentals with a 14% share, down from No. 2 at 17% in 1989. Through July 1991 it slipped to fifth at 11.8% for its 14 first-run releases, according to *Variety*. "Back to the Future III" drew the most ad support last year with $9.5 million.

Local attendance was boosted this spring at Universal Studios Hollywood from a price cut allowed California residents, although overall attendance is down as it is at Universal Studios Florida, open since May 1990.

Matsushita's U.S. operation, Matsushita Electric Co. of America, spent $22 million in media on its Panasonic brand, up 32%. The brand's new wet/dry shaver attracted $3.8 million of that.

HEADQUARTERS

Matsushita Electric Corp.,/Osaka, Japan.

Matsushita Electric Corp. of America/One Panasonic Way/Secaucus, N.J. 07094/Phone: (201) 348-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Grey Advertising, New York, Stewart Hegleman, exec vp.

PANASONIC CO.: Bob Greenberg, vp-gm, corp affairs.

Panasonic: VCRs, camcorders, color TVs, telephones & answering machines, home entertainment systems, tape recorders, radio/cassette players, personal word processors, fax-phones, marine radios/radar, consumer cellular phones, laser disc players, industrial batteries/business telephone systems: Grey Advertising, New York. Stewart Hegleman, exec vp.

Panasonic: car audio prods, home appliances, business cellular phones. Technics: audio prods, home audio, musical instruments: Levine, Huntley, Vick & Beaver, New York. Anthony Parks, acct dir.

QUASAR CO.: Matt Omoto, gm-mktg, electronics; John Monaco, gm-mktg, appliances; Dave Bearden, gm-sales.

In-house.

MCA INC.: David Weitzner, pres-worldwide mktg. MCA Motion Picture Grp.: Simon Kornblit, exec vp-worldwide mktg; Sally Van Slyke, sr vp-mktg/publicity/promo; David Sameth, sr vp-mktg/creative adv; Perry Katz, sr vp-mktg; Vic Fondrk, vp-media/coop adv. Andrew Kairey, vp-mktg, MCA Home Entertainment Grp.; David Weitzner, pres-worldwide mktg, MCA Recreation Svcs; Anthony Santosusso, mktg dir, Spencer Gifts; Al Teller, chmn-Music Entertainment Grp.; Shelly Schwab, pres-MCA Television Grp.; Jeffrey Schadlow, pres-NYLA Marketing.

Universal Pictures: DDB Needham Worldwide, Los Angeles. Ken Kaess, exec vp.

MCA Universal Home Video (MCA Home Entertainment Grp): Focus Media, Studio City, Calif. Jordan Levy, acct exec.

Universal Studios Hollywood, Universal Studios Florida (MCA Recreation Services): Foote, Cone & Belding, Los Angeles. Tom Lesinski, mgmt dir.

RANK: 30

May Department Stores Co.

St. Louis

Ad spending: **$363.6 million**

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	3,811	3,121	22.1
Sunday magazine	4,663	4,985	(6.4)
Newspaper	214,405	203,423	5.4
Outdoor	154	47	227.1
Network TV	7,447	5,259	41.6
Spot TV	21,490	23,897	(10.1)
Cable TV networks	428	0	NA
Spot radio	2,106	1,357	55.2
Measured media	254,505	242,089	5.1
Unmeasured	109,100	103,800	5.1
Total	363,605	345,889	5.1
By top brands	**1990**	**1989**	**% chg**
Lord & Taylor apparel	27,686	23,479	17.9
May Co. stores	22,865	20,558	11.2
May Co. apparel	22,127	22,432	(1.4)
Payless shoe stores	16,609	16,452	1.0
May Co. household	15,952	17,292	(7.8)
Foley's apparel	15,466	15,070	2.6
Hecht Co. apparel	13,010	13,713	(5.1)
Filene's apparel	11,574	9,540	21.3
Filene's institutional	10,529	10,405	1.2
Robinson's apparel	9,947	11,042	(9.9)

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	10,035	9,336	7.5
Earnings	500	515	(2.9)
Division sales	**1990**	**1989**	**% chg**
Department stores	8,669	8,106	6.9
Payless ShoeSource	1,366	1,230	11.1

CORPORATE PROFILE

May Department Stores Co. in 1990 found a way to generate steady sales growth—leave discounting and specialty operations to others and concentrate on the higher-growth, higher-return department store business.

May, reduced to a middle-market department store operation, so far has weathered the recession better than the retail industry. During the fourth quarter of 1990, May's sales improved 7.8%. It finished the year up 7.5%.

However, the chain's returns softened in fiscal first quarter 1991, ended in May, as earnings dipped 5% on a 5.8% growth in revenues. Same-store sales were off 2.5% for department stores and up 1.8% at Payless ShoeSource outlets.

The chain has enhanced growth by divesting Loehmann's specialty stores and Caldor discount chain. Venture Stores was spun off to stockholders last November. The three units had collective sales declines of 0.7% and 19.9% in 1988 and 1989, respectively. Venture returns are not in May's yearend returns.

Continuing to build its department store base, the company bought Thalhimer Bros. for $317 million from Carter Hawley Hale Stores in November 1990. The 26-unit chain gives May its first entry in Virginia and the Carolinas. May sold five Lord & Taylor stores in Florida to Dayton Hudson Corp.'s Mervyn's unit.

The company continued to build Payless ShoeSource, formerly named Volume Shoe Corp. As of June 1991, May operated 3,041 Payless stores in 47 states, an 8.6% increase since 1989.

Spending in May's primary ad medium, newspapers, rose 5.4% in 1990 for continuing operations. Print is handled in-house at each of the chains. Outside agencies work on broadcast, with two units, Famous-Barr and Payless, having agencies of record for broadcast only. Payless is the company's biggest user of network and spot TV, virtually its only media. Payless reshuffled allocations for the two media, with spot declining 16.4% to $9.2 million, while network increased 32.7% to $6.9 million.

Media rose 30% at L&T to $39 million and 35% at Filene's to $27 million, but dipped 8.8% to $31 million at Hecht's.

HEADQUARTERS

May Department Stores Co./611 Olive St./St. Louis, Mo. 63101/Phone: (314) 342-6300.

PERSONNEL, BRANDS, AGENCIES

FAMOUS-BARR: Paul G. Cavalli, sr vp-adv/sales promo.

Glennon & Co., St. Louis. Ruth McKinney, vp-mgmt super.

FILENE'S: Charlotte D. Brewer, sr vp-adv/sales promo.

In-house. Joseph Panessidi, div vp-dir, adv operations.

FOLEY'S: Linda Knight, sr vp-adv/sales promo.

Pacific Advertising, Houston (in-house). Wayne Franks, vp-creative dir.

G. FOX: Joseph Civitillo, sr vp-adv/sales promo.

In-house. Raina D'Amico, div vp-adv.

HECHT'S: Steven E. Wishnow, sr vp-adv/sales promo.

In-house. Joyce Perl, vp-adv dir.

KAUFMANN'S: Jerry J. Eccher, sr vp-adv/sales promo.

In-house. Barbara Mihopulos, vp-creative dir.

LORD & TAYLOR: Rita Lennick, sr vp-adv/sales promo.

In-house. Russ Hardin, vp-creative svcs.

L.S. AYRES: Mark G. Humphrey, sr vp-adv/sales promo.

In-house. Dick Allen, creative dir.

MAY CO., CALIFORNIA: Leonard N. Berliner, sr vp-adv/sales promo.

In-house. Karen Jones, div vp-adv dir.

MAY CO., OHIO: Jerry W. Hoegner, sr vp-adv/sales promo.

In-house. Debra Edwards, div vp-adv dir.

MAY D&F: Jan Ladnier, sr vp-adv/sales promo.

In-house. Fran Victor, prodn dir; Bill Gilbertson, financial dir.

MEIER & FRANK: David E. Miller, sr vp-adv/sales promo.

In-house. Nancy Altman, adv dir.

ROBINSON'S: Judy Farris, sr vp-adv/sales promo.

In-house. Marcia Cotner, vp-adv dir.

PAYLESS SHOESOURCE: Terry McDonald, sr vp-adv/sales promo.

Foote, Cone & Belding, Chicago. Paul Vernon, sr vp-grp acct dir.

THALHIMERS: Stephen D. Thorpe, sr vp-adv/sales promo.

In-house. Diane Cuckney, div vp-adv dir.

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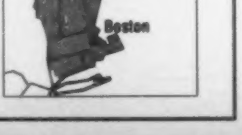

Source: WSJ 1988 Worldwide Subscriber Study.
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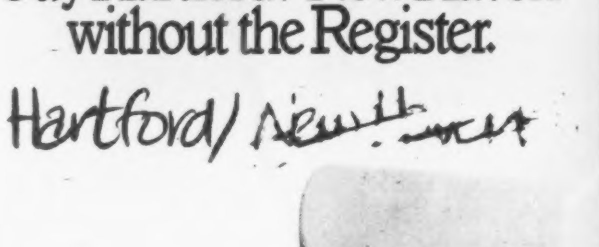

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SOURCE: Sales & Marketing Management Data Service (1989) and ABC.

New Haven Register

40 Sargent Drive, New Haven, CT 06511

RANK: 45

Mazda Motor Corp.

Hiroshima
Ad spending: **$247.9 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	48,526	39,063	24.2
Sunday magazine	37	36	1.1
Newspaper	6,144	3,585	71.4
Outdoor	2,153	323	567.2
Network TV	76,059	50,131	51.7
Spot TV	43,297	44,174	(2.0)
Syndicated TV	1,742	0	NA
Cable TV networks	946	2,615	(63.8)
Network radio	0	5	NA
Spot radio	2,253	3,577	(37.0)
Measured media	181,156	143,509	26.2
Unmeasured	66,700	52,800	26.3
Total	247,856	196,309	26.3
By top brands	**1990**	**1989**	**% chg**
Mazda cars	154,110	127,349	21.0
Mazda trucks	26,866	13,827	94.3

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	15,800	14,500	9.0
Earnings	191	188	1.6

CORPORATE PROFILE

Mazda Motor Corp. last month unveiled its luxury car division, Amati, that will put the carmaker in league with the pricey Acura, Lexus and Infiniti lines of its Japanese competitors and the high-end European imports.

Amati, to be sold from a separate dealer network from Mazda, will offer two sedans priced in the $25,000 to $45,000 range beginning in 1994. A five-agency short list will compete for the reported $50 million account.

Mazda Motors of America, the U.S. subsidiary, gained share points in the U.S. in 1990 by selling 349,677 cars and trucks, including 72,657 of the U.S.-built 626 and MX-6 models, up 2.3%. This resulted in a 2.5% share of the U.S. car/-truck market, up from 2.3%. Among Japanese importers, Mazda ranked fourth behind Toyota's leading 7.2% share, Honda at 6.2% and Nissan at 4.3%.

Mazda actually sold 455 fewer cars in 1990 than in 1989, as sales of light pickup trucks came to 123,965 units, up 7.1%.

Expansion-minded Mazda called off long-term negotiations for a joint venture in Europe with Ford Motor Co., which owns 23.4% of Mazda. The Ford Probe is produced at the Mazda manufacturing plant in Flat Rock, Mich.

Mazda's intermediate 626 (both domestic and imported models) was the company's best seller, with sales of 64,242 units, up 21.7%. The 626 accounted for $22.5 million in media, a 61% boost over 1989, with about $17 million in network and spot TV and the rest magazines.

The MX-5 Miata convertible continued its sales success and accounted for 35,944 units, up 56% from 1989, its first year. The Miata got $23 million in media.

Mazda launched the Navajo sport-utility vehicle in a multimedia campaign that included $18.4 million in media, mostly TV and magazines. In its first year, 3,409 units were sold.

The Mazda Protege subcompact got $8 million in media backing, same as in 1989; the 323 subcompact, $13.5 million, down 13.5%; and the top-of-the-line 929, $7.8 million, down 38%.

Mazda in the next nine months is expected to introduce the new MX-3 coupe and replacements for the RX-7, 626, MX-6 and 929.

Mazda advertising for the 1991 models, themed, "Mazda. It just feels right," dropped the "Kansei engineering" subtheme that underscored the company's vehicle design philosophy in 1990.

Mazda increased its commitment to sports event marketing, including sponsorship of marathons and a car racing team at LeMans. This month it also inked a three-year $96 million cross-media package with Time Warner.

Newly installed Chief Operating Officer Clark Vitulli, an executive recruited from Chrysler, took charge of the two just-merged units, MMA (East) and MMA (Central).

He also reorganized the new company into three main groups: sales, marketing and product planning, and merged service and parts into a single unit reporting directly to him.

HEADQUARTERS

Mazda Motors of America/7755 Irvine Center Dr./Irvine, Calif. 92718/Phone: (714) 727-1990.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Mazda Autos: Clark Vitulli, coo, sr vp-gm; Jan Thompson, vp-mktg; Richard Balsiger, adv dir; Richard Colliver, grp vp-gm, Amati div; John Kramer, dir-mktg, Amati div.

Mazda: Foote, Cone & Belding, Santa Ana, Calif. William Hagelstein, exec vp-gm.

RANK: 8

McDonald's Corp.

Oak Brook, Ill.
Ad spending: **$764.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	3,291	669	391.8
Sunday magazine	4	0	NA
Newspaper	567	527	7.7
Outdoor	5,167	5,919	(12.7)
Network TV	230,994	252,066	(8.4)
Spot TV	145,986	141,268	3.3
Syndicated TV	28,009	17,409	60.9
Cable TV networks	8,795	7,223	21.8
Network radio	8	0	NA
Spot radio	3,223	6,697	(51.9)
Measured media	426,044	431,778	(1.3)
Unmeasured	338,100	342,600	(1.3)
Total	764,144	774,378	(1.3)
By top brands	**1990**	**1989**	**% chg**
McDonald's restaurants	426,042	428,118	(0.5)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	6,640	6,066	9.5
Earnings	802	727	10.3
U.S.	**1990**	**1989**	**% chg**
Sales	3,871	3,887	(0.4)
Operating income	986	989	(0.3)
Division sales	**1990**	**1989**	**% chg**
Company-operated restaurants	5,019	4,601	9.1
Revenue from franchisees	1,621	1,465	10.6
Systemwide results	**1990**	**1989**	**% chg**
Company-operated restaurants	5,019	4,601	9.1
Franchisees	12,017	11,219	7.1
Affiliates	1,723	1,513	13.9
Total systemwide sales	18,759	17,333	8.2

CORPORATE PROFILE

McDonald's Corp. adopted a new ad theme—"Food, folks and fun"—in May 1990, but within a year it was gone, replaced by the more sober "McDonald's today."

Along with the theme, much of the fun has gone out of the U.S. business for McDonald's, the result of changing eating habits and of a recession that put the squeeze on the whole fast-food industry.

In the U.S., sales of its 8,576 restaurants rose 2%, but that was lower than its rate of expansion, since its number of domestic units increased 3.7% during the year. Average sales for each domestic unit rose only 1.7% to $1.65 million, less than the hike in menu prices, analysts said.

In short, McDonald's sales went backwards, as did its market share, slipping to 34.4% of the hamburger/sandwich market in 1990 from 36.2%, according to *Nation's Restaurant News*.

McDonald's has jettisoned its traditional conservatism toward change to take on a broad range of competitors—from the mom-and-pops to the microwave.

In test are large pizzas for dinner and single-serve pizzas for lunch, pasta dishes, a line of turkey, ham and cold cut subs, skinless roasted chicken, a grilled chicken breast sandwich, barbecued chicken wings and a concept called McExtras, in which staples such as milk, butter and eggs are offered in restaurants.

Nationally, a Grilled Steak sandwich has been offered as a limited-time addition, and new menu staples include Breakfast Burrito, cold cereals (from General Mills) and Chicken Fajitas.

Perhaps McDonald's most important menu addition was the national introduction this April of the McLean Deluxe, a 91% fat-free hamburger meant to improve the chain's nutritional profile.

The company is rethinking operations, leading it a year ago to open the Golden Arch Cafe in Hartsville, Tenn. The cafe is very un-McDonald's: it offers meat loaf and country-fried steak. The idea—to

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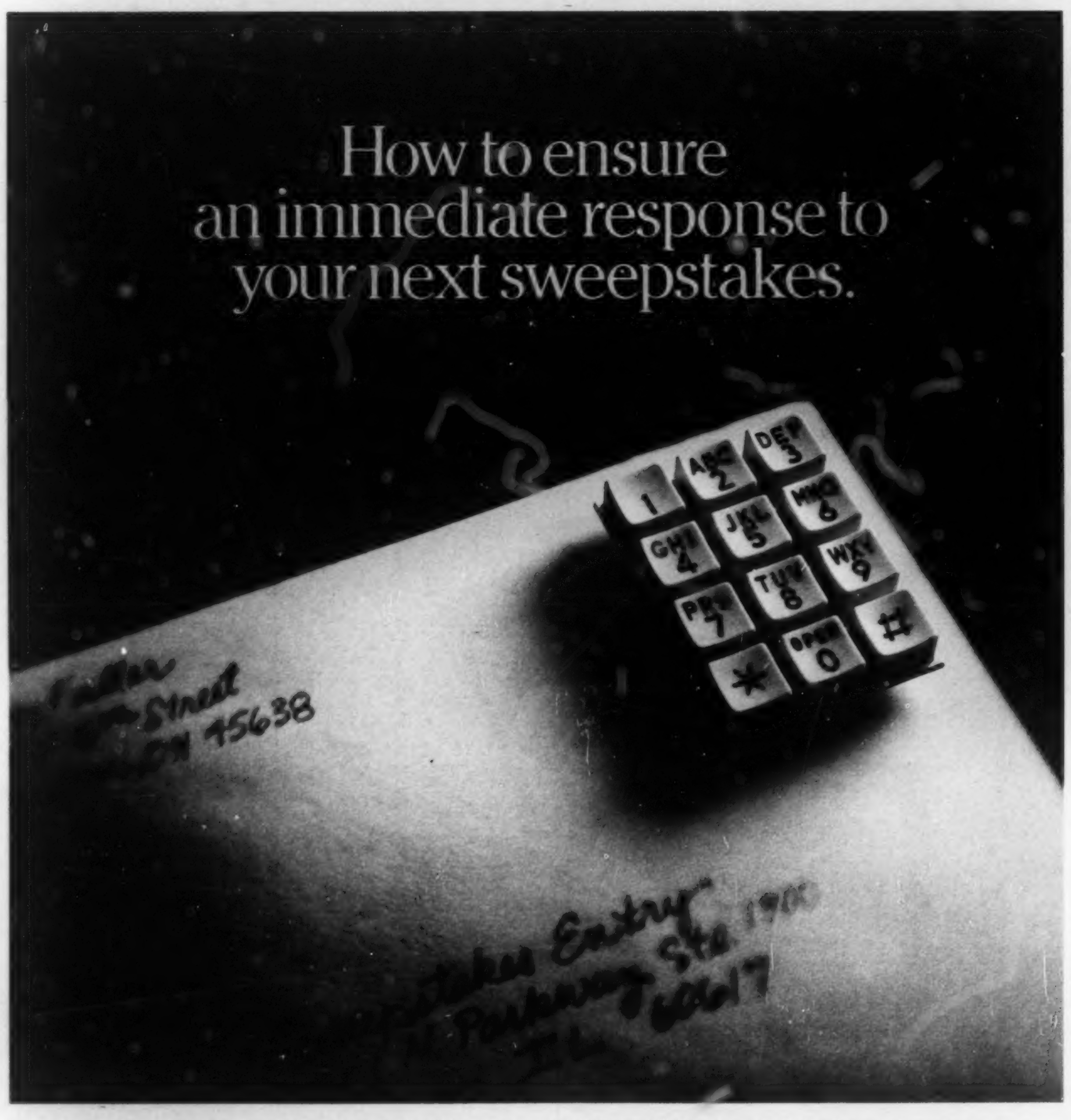
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Top 25 cable TV* advertisers

Rank	Advertiser	Cable TV network spending 1990	1989	% chg
1	**Procter & Gamble Co.**	$57.7	$38.9	48.5
2	**Time Warner**	50.7	37.5	35.0
3	**General Mills**	27.4	21.3	28.6
4	**Anheuser-Busch Cos.**	26.8	26.3	1.9
5	**Philip Morris Cos.**	26.6	20.5	29.8
6	**General Motors Corp.**	26.0	21.0	23.4
7	**RJR Nabisco**	21.7	17.9	21.4
8	**Sears, Roebuck & Co.**	19.8	13.3	48.1
9	**AT&T Co.**	15.3	6.6	133.0
10	**PepsiCo**	13.1	9.7	34.7
11	**Levi Strauss & Co.**	12.7	9.5	33.8
12	**Eastman Kodak Co.**	12.6	10.6	18.3
13	**Hasbro Inc.**	11.1	7.8	42.6
14	**American Home Products Corp.**	10.83	9.9	9.9
15	**Clorox Co.**	10.76	9.1	17.9
16	**Mars Inc.**	10.4	14.0	(25.6)
17	**Grand Metropolitan**	10.3262	5.6	85.1
18	**Bristol-Myers Squibb Co.**	10.3255	9.9	4.8
19	**Wm. Wrigley Jr. Co.**	10.2	8.0	27.1
20	**Sony Corp.**	9.7	5.8	68.3
21	**Ford Motor Co.**	9.5	7.5	26.5
22	**Chrysler Corp.**	9.2	11.9	(22.1)
23	**McDonald's Corp.**	8.8	7.2	21.8
24	**Nestle SA**	8.5	6.6	28.9
25	**Johnson & Johnson**	8.3	7.1	16.8

Note: Dollars are in millions. * Includes CNN, MTV, USA, ESPN, WTBS and Family Channel. **Source:** LNA/Arbitron. See Page 71 for methodology and other source information.

find a restaurant concept for markets too small to support a regular McDonald's—has not produced the results expected. It's begun building double drive-through restaurants that offer a limited menu and no interior seating.

To counter the recession, McDonald's instituted several Value Menus with permanent price reductions. Ads have emphasized price reductions and menu additions rather than image, as the ad budget has become more localized; network TV spending declined 8.4%, while spot TV spending rose 3.3%, syndicated programming buys jumped 60.9% and cable TV spending rose 21.8%.

McDonald's has cut back on promotional marketing. A major game promotion tied to the movie "Dick Tracy" and another, "McMillions," a joint promotion with NBC in September 1990, failed to revive sales. There were no major national promotions through the first half of 1991.

Changes even were made in its ad agency lineup. DDB Needham Worldwide was given responsibility for advertising to teenagers in November 1990. That represents a $55 million chunk of the $300 million national account. Needham had been McDonald's sole national agency until it was dropped and replaced in 1981 by Leo Burnett USA, which continues to handle the rest.

The most controversial change was its decision to phase out use of polystyrene plastic-foam packaging in favor of coated paper. The company is switching to paper because it said discussions with the Environmental Defense Fund had convinced it paper takes less space in overcrowded landfills.

HEADQUARTERS

McDonald's Corp./One McDonald's Plaza/Oak Brook, Ill. 60521/Phone: (708) 575-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Paul D. Schrage, sr exec vp-chief mktg officer; David B. Green, Richard G. Starrmann, sr vps-mktg; Roy Bergold, vp-adv; Ronald W. Miessler, vp-comms svcs; Jim Rand, vp-mktg svcs; Charles L. Rubner, vp-comms; Don Dempsey, asst vp-intl mktg; Linda Kravity, Bill Lamar, asst vps-natl mktg; Sandy Silver, asst vp-mktg; Dean Barrett, dir-natl mktg; Terri Capatosto, dir-media relations; Chuck Ebeling, dir-corp comms; Mike Gordon, dir-intl comms; George Griggs, dir-field mktg; Court Kenaston, dir-intl mktg; Thom Kettle, dir-new prods mktg; Jan Kramer, dir-real estate mktg; Roger Lipker, dir-comms; Don Lorr, dir-mktg research; Susan Clark McBride, dir-publications/customer relations; Bridget Marshall, dir-pr; Steve Nubie, dir-adv; Stephanie Skurdy, dir-education; Bruce Smith, dir-media.

McDonald's: Leo Burnett USA, Chicago. Jerry Connor, exec vp-client svcs dir. DDB Needham Worldwide, Chicago. Dick Rogers, exec vp-grp acct dir.

Black consumer mktg: Burrell Advertising, Chicago. Sarah Sears, vp-acct dir.

Hispanic consumer mktg: Castor Advertising, New York. Castor Fernandez, pres.

Sales promo: Frankel & Co., Chicago. Rick Bollinger, Bob Schneider, vps-mgmt reps. Simon Marketing, Oak Brook, Ill. Jay Babineau, Paul Marcus, exec vps.

Public relations: Golin/Harris, Chicago. Steve Crews, exec vp-acct dir. Burson-Marsteller, Chicago. John LeSage, exec vp-gm; Harlan Teller, exec vp-client svcs.

Black consumer public relations: Burrell Public Relations, Chicago. Tina Carol Gay, sr vp.

RANK: 77

Mobil Corp.

New York

Ad spending: **$140.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	6,579	4,497	46.3
Sunday magazine	19	28	(34.6)
Newspaper	3,236	3,641	(11.1)
Outdoor	11	28	(59.1)
Network TV	9,790	12,118	(19.2)
Spot TV	14,455	14,654	(1.4)
Syndicated TV	2,682	4,180	(35.8)
Cable TV networks	1,579	1,890	(16.5)
Network radio	239	427	(44.0)
Spot radio	4,470	6,505	(31.3)
Measured media	43,060	47,967	(10.2)
Unmeasured	97,200	108,300	(10.2)
Total	140,260	156,267	(10.2)
By top brands	**1990**	**1989**	**% chg**
Mobil gasoline & oil	24,298	25,804	(5.8)
Hefty storage bags	12,423	12,941	(4.0)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	64,472	56,188	14.7
Earnings	1,929	1,809	6.6
U.S.	**1990**	**1989**	**% chg**
Sales	21,198	19,191	10.5
Earnings	415	731	(43.2)
Division sales	**1990**	**1989**	**% chg**
Petro exploration, production	5,833	4,824	20.9
Petro marketing, refining	53,882	46,615	15.6
Chemicals	4,084	4,039	1.1

CORPORATE PROFILE

Many advertisers fled the airwaves in January when the bombs began raining on Baghdad, but Mobil Corp. and the rest of the oil industry were especially hasty in beating a retreat.

Mobil's first-quarter 1991 media spending was down 54% from one year earlier; it's believed spending resumed usual patterns at the approach of summer.

Following the lead of Chevron and Texaco's Central region, last April Mobil instituted same-price cash or credit policies for retail gasoline purchases.

It has expaned a motor oil recycling program to include 550 Mobil stations that accept used oil and more than 1,800 others that have joined an educational effort urging do-it-yourselfers to dispose of motor oil responsibly.

Mobil is upgrading its stations to its Pegasus 21 prototype that features self-service pumps, electronic payment systems and a minimart. It's also experimenting with 12 Express Lube outlets.

In 1990, Mobil, with 9,000 stations, was the fourth-largest gasoline marketer with a 6.61% share of the 114.6 billion gallons purchased, according to the Lundberg Survey, which ranked Shell Oil Co. No. 1 with a 7.92% share, followed by Amoco Corp., 7.48%, and Exxon Corp., 6.85%.

While gasoline marketers in general are jumping on the green bandwagon, Mobil Chemical Co., marketer of Hefty trash bags, has jumped off. It's now gun-shy about making environmental claims after raising the ire of the FTC and seven state attorneys general over degradability claims. Mobil settled the fraud and deceptive-advertising suits with the states and paid a $250,000 fine but admitted no wrongdoing.

Mobil says it won't make green claims until national standards are set. Mobil was true to its word when in April it introduced Hefty Steel-Sak trash and tall kitchen garbage bags, using 30% less material. Mobil backed its Hefty line with $14.4 million in advertising, down 10.6%.

HEADQUARTERS

Mobil Corp./3225 Gallows Rd./Fairfax, Va. 22037/Phone: (703) 846-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Allen E. Murray, chmn-pres-ceo.

DDB Needham Worldwide, New York. Lawrence Iannuzzelli, exec vp.

MOBIL OIL CORP.: Eugene A. Renna, pres-Mobil Mktg. & Refining Worldwide; Robert O. Swanson, exec vp-intl mktg & refining. Mobil U.S. Marketing & Refining Div.: Joseph L. Cooper, exec vp; Robert J. McCool, vp-U.S. mktg; Stephen D. Pryor, mktg mgr.

Mobil auto gasoline, Mobil 1 oil: DDB Needham Worldwide, New York. Lawrence Iannuzzelli, exec vp.

MOBIL CHEMICAL CO.: Philip W. Matos, pres; Robert L. Cauffman, vp-mktg.

Hefty Bags, Baggies, Kordite: Wells Rich Greene BDDP, New York. Dick Byrne, exec vp.

RANK: 100

Monsanto Co.

St. Louis

Ad spending: **$114.6 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	11,379	5,575	104.1
Sunday magazine	236	0	NA
Newspaper	1,226	243	404.7
Outdoor	28	4	592.7
Network TV	36,281	34,813	4.2
Spot TV	14,361	15,799	(9.1)
Syndicated TV	2,974	984	202.2
Cable TV networks	2,588	1,321	96.0
Network radio	3,360	1,899	76.9
Spot radio	596	4,697	(87.3)
Measured media	73,029	65,335	11.8
Unmeasured	41,600	37,300	11.5
Total	114,629	102,635	11.7
By top brands	**1990**	**1989**	**% chg**
NutraSweet sweetener	23,008	25,644	(10.3)
Equal sweetener	12,076	9,142	32.1
Monsanto carpet	11,392	286	NA
Simple Pleasures frozen dessert	5,541	0	NA

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	8,995	8,681	3.6
Earnings	546	679	(19.6)
U.S.	**1990**	**1989**	**% chg**
Sales	5,685	5,590	1.7
Operating income	639	721	(11.4)
Division sales	**1990**	**1989**	**% chg**
Agricultural products	1,676	1,717	(2.4)
Chemicals	4,035	4,065	(0.7)
Fisher Controls	927	852	8.8
NutraSweet	933	869	7.4
Pharmaceuticals	1,424	1,178	20.9

CORPORATE PROFILE

With patent protection for aspartame ending in the U.S. in December 1992, Monsanto Co. has begun an extensive campaign to build consumer loyalty for its NutraSweet brand.

The product's eponymous subsidiary, NutraSweet Co., also is spending heavily to introduce a second potentially big product line, the fat substitute Simplesse. Just as Equal tabletop sugar substitute was the consumer "taste" test for NutraSweet when it entered the market 10 years ago, a frozen dairy dessert line called Simple Pleasures is Simplesse's taste vehicle.

Backing for both substitutes claimed 62%, or $44.6 million, of Monsanto's total media spending in 1990, up from 58%. The subsidiary accounted for 10% of Monsanto sales and 20% of operating income in 1990.

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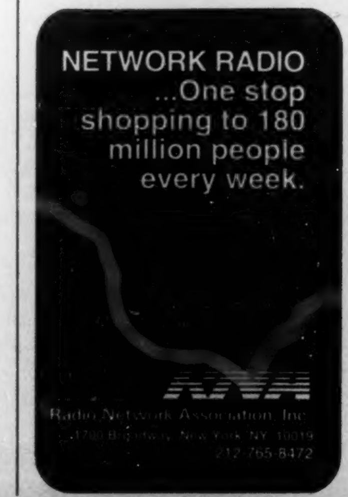

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bicides, pesticides and fertilizers, and advertises the products mostly in farm journals—part of unmeasured media in *Ad Age's* ad totals for Monsanto. Its carpets and fibers received sizable consumer ad support, last year reaching $13.4 million in media, up 21.8%.

G.D. Searle & Co., its pharmaceutical company, developed aspartame and laxative Metamucil, among others. Searle retained foreign marketing rights to the top-selling laxative when it sold the product to Procter & Gamble Co. in 1985. The foreign rights were turned over to P&G in January 1991.

NutraSweet enters its critical new age with a new agency, Chiat/Day/Mojo, winner of the $35 million U.S. sweetener account in December 1990 from Ogilvy & Mather, Chicago. O&M kept the $15 million overseas NutraSweet business and the estimated $10 million Equal tabletop sweetener account. Several months later, O&M, which also had retained the Simplesse business, lost it to FCB/Leber Katz Partners. Chiat's first big effort was a $25 million marketing campaign that broke this May.

Monsanto needs to get the consumer to insist on NutraSweet. But Coca-Cola Co. and PepsiCo, which are 80% of the market for NutraSweet, can produce their own when the patent expires. Even if they don't, they are likely to get a better price from Monsanto or another producer.

NutraSweet sells for about $90 a pound in the U.S. It is about $25 a pound in countries without patent protection. Prices dropped 6% worldwide in 1990.

The company is broadening its use of NutraSweet with two products in test: Desserve, a line of reduced-sugar, lower-calorie desserts, salads and sandwiches marketed through Mrs. Fields Inc. outlets, and tabletop Sugar Delight, a blend of 1% NutraSweet sweetener and 99% sugar. The plain sugar sweetener market is much larger than the market for substitute sweeteners.

Simplesse currently faces competition from Pfizer's Litesse. Both P&G's olestra and Kraft General Foods' Trailblazer await FDA approval, and A.E. Staley Co.'s Stellar, remains under development.

This August the FDA extended the use of Simplesse from frozen goods to a wide range of products, including mayonnaise and baked goods.

Simple Pleasures Light frozen dessert, introduced this spring, became the first product made with both Simplesse and NutraSweet. Baskin-Robbins Ice Cream Co. also launched a Simplesse-based frozen dessert into its dipping stores nationwide.

HEADQUARTERS

Monsanto Co./800 N. Lindbergh Blvd./St. Louis, Mo. 63167/Phone: (314) 694-1000.

PERSONNEL, BRANDS, AGENCIES

MONSANTO AGRICULTURAL CO.: Robert B. Shapiro, pres; James I. Brezovec, dir-mktg, crop protection prods; Arnold W. Donald, vp-residential prods div; Jerry Neff, dir-U.S. Roundup div.

Crop protection products, Roundup: BTB Communications, St. Louis. Joe Osborn, pres.

Residential products: Patrick Co., St. Louis. Tom Graves, vp.

MONSANTO CHEMICAL CO.: Robert G. Potter, pres; David L. Sliney, vp-mktg; Joan Cornwall, dir-mktg comms.

FISHER CONTROLS INTERNATIONAL: Larry W. Solley, chmn-ceo-pres; John R. Weekley, vp-sales/mktg, N. Amer.

Mintz & Hoke, Avon, Conn. Jim Hazen, acct mgr.

NUTRASWEET CO.: Robert E. Flynn, chmn-ceo; Lauren S. Williams, pres-coo; Jan Novak, vp-sales/mktg.

Equal: Ogilvy & Mather, Chicago. Myron Lyskanycz, super-grp acct dir.

NutraSweet: Chiat/Day/Mojo, Venice Calif. Bob Grossman vp-mgmt super.

G.D. SEARLE & CO.: Sheldon G. Gilgore, chmn-pres-ceo; Chuck Fry, vp-corp public affairs; Joseph Curti, pres-N. Amer. operations.

William Douglas McAdams, New York. Eugene Fine, super.

RANK: 51

Montgomery Ward & Co.

Chicago

Ad spending: **$205.6 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	540	359	50.4
Sunday magazine	68	6	1,037.9
Newspaper	82,101	67,241	22.1
Outdoor	41	4	1,008.1
Spot TV	17,069	23,236	(26.5)
Spot radio	3,389	16,373	(79.3)
Measured media	103,206	107,219	(3.7)
Unmeasured	102,400	106,400	(3.8)
Total	205,606	213,619	(3.8)

U.S. AD SPENDING ($ in thousands)

By top brands	1990	1989	% chg
Montgomery Ward household	41,251	31,394	31.4
Montgomery Ward general	34,902	42,155	(17.2)
Montgomery Ward apparel	13,063	11,059	18.1
Montgomery Ward automotive	7,523	8,093	(7.0)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	5,500	5,323	3.3
Earnings	153	151	1.3

CORPORATE PROFILE

Montgomery Ward & Co., the ninth-largest U.S. retailer, has stuck to its game plan of opening 15 to 20 new stores per year, while adding more national brand names to its merchandise mix and aggressively promoting its separate specialty store formats.

Ward's, unlike many retailers in today's market, isn't under a cloud of heavy debt. Though it became highly leveraged in a 1988 buyout led by managers including Chairman-CEO Bernard Brennan, that debt has been reduced to $600 million from more than $2 billion.

Since early 1990, Ward's has added 30 new full-line stores, divided into its four major specialty formats of Electric Avenue, Home Ideas, the Apparel Store and Auto Express.

Subspecialties have been added to the major specialty formats, including the Kids Store within most of its Apparel Store locations and Gold 'N Gems jewelry shops attached to about half the Apparel Store outlets.

A new subspecialty window furnishings store called Window Ideas is being tested within some of Ward's Home Ideas shops.

The bulk of Ward's advertising is in newspapers, which got a 22.2% increase, with most spent on midweek and Sunday newspaper inserts, handled in-house. Newspaper growth was a media reapportionment, primarily from spot TV allocations, which dropped 26%.

In late 1990, Ward's indicated it would increase its spot TV by reviewing its broadcast account, which had been at Saffer Advertising for two years. After a protracted review, the $25 million account went to D'Arcy Masius Benton & Bowles.

This June, Ward's surprised many saying it planned to re-enter the catalog business. In 1985, the company had closed the money-losing operation that generated $1.5 billion in revenue.

This time, Ward's won't have its own catalog but will work closely with about 20 existing specialty catalog marketers in a joint marketing venture.

Former general catalog President Richard Bergel was named to head the new operations; most recently, he was president of store operations.

In May, Ward's announced a new national marketing partnership with Thrifty Rent-A-Car System, primarily aimed at building the retailer's credit card usage. Thrifty will add outlets in most Ward's Auto Express stores. Ward's promoted the Thrifty connection in newspaper ads and direct mail.

In its stores, Ward's continues to add national brands, including licensing Maytag Corp.'s Admiral name for a line of private-label appliances, and Bell & Howell's name for a line of private-label camcorders and consumer electronics.

HEADQUARTERS

Montgomery Ward & Co./Montgomery Ward Plaza/Chicago, Ill. 60671/Phone: (312) 467-2000.

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PERSONNEL, BRANDS, AGENCIES

CORPORATE: William J. McCarthy, pres-mktg; Jack Kramer, vp-adv operations; Ron Nugent, dir-promo planning/adv admin; Jim Neustadt, dir-creative adv; Bill Motsinger, dir-merch mktg.

Montgomery Ward: D'Arcy Masius Benton & Bowles, Chicago. Michael J. Leonhardt, sr vp-grp acct dir.

RANK: 14

Nestle SA

Vevey, Switzerland
Ad spending: $635.9 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	69,375	77,767	(10.8)
Sunday magazine	4,633	3,352	38.2
Newspaper	4,357	2,553	70.7
Outdoor	942	158	495.9
Network TV	145,571	125,785	15.7
Spot TV	50,490	56,118	(10.0)
Syndicated TV	36,735	33,468	9.8
Cable TV networks	8,390	6,595	27.2
Network radio	2,394	8,113	(70.5)
Spot radio	2,908	2,700	7.7
Measured media	325,795	316,609	2.9
Unmeasured	310,100	301,400	2.9
Total	635,895	618,009	2.9
By top brand	**1990**	**1989**	**% chg**
L'Oreal Plenitude skin cream	20,197	12,331	63.8
Taster's Choice coffee	20,141	19,647	2.5
L'Oreal hair coloring	19,287	221,166	(8.9)
Friskies cat food	15,136	10,696	41.5
Coffee-mate non-dairy creamer	13.735	9,250	48.5
L'Oreal lip & eye prdts	11,793	3,130	276.7
Safari perfume	11,606	0	NA
Lancome creams & lotions	10,946	11,940	(8.3)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	36,511	30,596	19.3
Earnings	1,780	1,536	16.5

CORPORATE PROFILE

Nestle SA, the world's largest food company, in January 1991 folded its scattered U.S. food business into a holding company, Nestle USA, run by President-CEO Timm Crull, who came from the same post at Nestle's Carnation Co. It projected 1991 sales would rise above $7 billion.

Nestle USA this March sifted 15 companies into six units: Nestle Beverage Co. includes coffee, tea, juice and Coffee-mate; Nestle Food Co. oversees the food business; Nestle Frozen/Refrigerated Food Co. manages Stouffer frozen entrees, the Contadina refrigerated line and ice cream; and Nestle Brands, The Foodservice Co., runs Nestle USA's institutional food sales. Stouffer Hotels, Resorts and Restaurants and Wine World Estates, a California wine marketer, remain basically unchanged.

Nestle USA in April 1991 consolidated all media buying at McCann-Erickson Worldwide after soliciting media proposals from all its agencies. McCann set up a unit, Comcord Group, to service the account. McCann three years ago had only about $5 million in Nestle business.

Nestle USA was comparatively quiet on the new-product front. Nestle Beverage in April 1991 introduced Hills Bros. Perfect Balance, the first half-regular, half-decaffeinated coffee available nationally. Nestle Food this month introduced nationally Libby's Diner, a shelf-stable microwave line closely resembling Dial Corp.'s Lunch Bucket.

Nestle Frozen/Refrigerated Food in May 1991 voluntarily dropped "fresh" from the label of Contadina Fresh refrigerated pasta sauces after meeting with the FDA.

It boosted chocolate and confection media spending in 1990 by 39.2% to $38.4 million, largely reflecting the purchase of Butterfinger from RJR Nabisco.

The company cut spending on pet foods by 17.2% to $28 million. Nestle's Carnation, ranked No. 2 in the $5.7 billion supermarket pet food market, rose from a 13.9% share to 14.4% in 1990, compared with leader Ralston's 26.4%, according to John C. Maxwell Jr. of Wheat, First Securities.

Nestle inched up media spending by 1.9% to $38 million for Stouffer frozen foods, which have been under assault from ConAgra's Healthy Choice and other brands that hype nutrition.

Nestle coffee brands received $31 million in media in 1990, down 10.2%. That reduction is the result of Nestle slashing spending by 92.5% to $651,300 on Nescafe; Nestle restaged the brand in early 1991 as Nescafe Coffee Crystals, borrowing an idea from Procter & Gamble Co.'s Folgers. Nestle holds 33.3% of the instant market, second to Kraft General Foods' 36.3%.

Nestle Beverage is testing ground coffee versions of Nescafe and Taster's Choice and Nescafe Mocca Cooler iced coffee. The latter might get subsumed by a joint venture between Nestle USA's parent and Coca-Cola Co. to market ready-to-drink iced coffee and tea worldwide.

Cosmair, the U.S. marketing arm of France's L'Oreal that is majority-owned by Nestle, increased media spending in 1990 by 17.4% to $118.1 million.

The mainstay L'Oreal line received $73.1 million in media spending, up 19.2%, much of that increase from the $9.1 million spent supporting new L'Oreal shampoo. Cosmair's other major product line, Lancome, increased spending 11.5% to $23.6 million.

Cosmair's chairman, Jacques Correze, 79, died in June 1991 shortly after he resigned following disclosure that the U.S. Justice Department was reviewing his pro-Nazi activities during World War II. Lindsay Owen-Jones, L'Oreal's chairman-ceo, added the title of Cosmair chairman.

HEADQUARTERS

Nestle SA/Avenue Nestle 5/CH-1800 Vevey, Switzerland.

Nestle USA/800 N. Brand Blvd./Glendale, Calif. 91203/Phone: (818) 549-6000.

PERSONNEL, BRANDS, AGENCIES

NESTLE USA: John McMennamin, vp-mktg svcs; Anne Fox, corp media dir.

Nestle USA-media buying: Comcord Group (McCann-Erickson Worldwide), New York. George T. Hayes, dir.

NESTLE BEVERAGE CO.: Barry Reis, sr vp-mktg.

Nescafe coffee, Taster's Choice coffee, Nestea, Coffee-mate: McCann-Erickson, New York. Michael Mainthow, vp-acct dir.

Nestle Quik: McCann-Erickson, San Francisco. Claire Roundal, sr vp-mgmt super.

Hills Bros. coffee, Chase & Sanborn coffee, Carnation Hot Cocoa: Cohen/Johnson, Los Angeles. Mark Johnson, pres. Hawk Media, San Francisco. Scott Cowan, media super.

MJB coffee: Hal Riney & Partners, San Francisco. Andrea Alfano, vp-mgmt super.

Juicy Juice, Kern, Libby's juices: Bloom FCA!, Dallas. Laura Black, acct super.

Hispanic adv: coffee, Coffee-mate: La Agencia de Orci & Asociados, Los Angeles. Roberto Orci, sr vp-acct mgmt rep.

NESTLE FOOD CO.: John McMennamin, vp-mktg svcs.

Carnation Instant Breakfast, Contadina canned products, Friskies cat food, Come 'N Get It dog food, Grand Gourmet dog food, Mighty Dog dog food, Superior Brands pet treats, Libby's Diner entrees, Libby pumpkin, Libby canned meats, Carnation evaporated milk: Dailey & Associates, Los Angeles. John Stranger, sr vp-mgmt super.

Fancy Feast cat food, Carnation Follow-Up & Good Start infant formulas: McCann-Erickson, Los Angeles. Alan Burgis, sr vp-mgmt rep.

Carnation infant formulas-direct marketing: McCann Direct, New York. Keith Weld, vp-mgmt super.

Carnation infant formulas-professional adv: M.E.D. Communications, Woodbridge, N.J. Randi Kessler, acct super.

Carnation infant formulas-Hispanic adv: La Agencia de Orci & Asociados, Los Angeles. Roberto Orci, sr vp-acct mgmt rep.

Nestle Crunch, Goobers, Raisinets, Bit-O-Honey, 100 Grand Bar, Laffy Taffy, Baby Ruth, Butterfinger: Jordan, McGrath, Case & Taylor, New York. Stephen Badenhop, exec vp.

O'Henry, Chunky, Nestle Bars, Alpine White, After Eight, Turtles, Tollhouse, Nestle Morsels: J. Walter Thompson USA, New York. Bruce Kelley, sr vp-mgmt dir.

SweeTARTS: Glennon & Co., St. Louis. Lora Reardon, acct exec.

NESTLE FROZEN/REFRIGERATED FOOD CO.: Jerry DeCroce, vp-mktg svcs.

Lean Cuisine: Tatham/RSCG, Chicago. Robert Hielscher, mg partner.

Stouffer: Della Femina, McNamee, Pittsburgh. Richard Grinberg, sr vp-mgmt super.

Buckley's ice milk, Carnation ice cream, Drumstick sundae cones, Flintstones push-ups, Simply Sundaes: Fahlgren Martin, Dublin, Ohio. Lisa Hamilton, vp-acct dir.

Bon Bons ice cream nuggets; Baby Ruth, Butterfinger, Nestle Crunch, 100 Grand ice cream bars: Jordan, McGrath, Case & Taylor, New York. Stephen Badenhop, exec vp.

STOUFFER HOTELS, RESORTS AND RESTAURANTS: Rick Cassara, vp-mktg, restaurants; Robert Nance, dir-adv, hotels.

Stouffer hotels, resorts, restaurants: Wyse Advertising, Cleveland. Bill Smith, vp-acct grp super.

WINE WORLD ESTATES: Janelle Thompson, sr vp-mktg.

Beringer, C&B Vintage Cellars, Chateau Souverain, Maison Deutz, Meridian, Napa Ridge: Fran Hulse Advertising, San Francisco. Fran Hulse, pres.

COSMAIR INC.: Guy Peyrelongue, pres-ceo.

Colorvive Technicare, Preference, Studio Line haircare products; Drakkar Noir, Vanderbilt fragrances; L'Oreal cosmetics: McCann-Erickson Worldwide, New York. Annette McEvoy, grp acct dir.

Armani, Lancome, Plenitude, Biotherm: Publicis, New York. Frederick Rhines, pres-ceo.

Ralph Lauren fragrances: Carlson & Partners. Sandra Carlson, pres.

RANK: 88

News Corp.

Sydney
Ad spending: $126.7 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	13,846	12,583	10.0
Sunday magazine	145	93	56.2
Newspaper	28,471	21,419	32.9
Outdoor	600	124	382.6
Network TV	24,787	26,461	(6.3)
Spot TV	27,880	29,514	(5.5)
Syndicated TV	6,459	4,792	34.8
Cable TV networks	3,327	2,600	27.9
Network radio	1,449	2,194	(34.0)
Spot radio	14,205	24,759	(42.6)
Measured media	121,169	124,539	(2.7)
Unmeasured	5,500	5,700	(3.5)
Total	126,669	130,239	(2.7)
By top brands	**1990**	**1989**	**% chg**
20th Century Fox movies	78,427	52,787	48.6
Fox Broadcasting Co TV network	24,849	14,154	75.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	8,587	6,720	27.8
Earnings	(308)	263	NA
U.S.	**1991**	**1990**	**% chg**
Sales	5,134	3,780	35.8
Operating income	805	613	31.3

CORPORATE PROFILE

Project Dolphin, the code name for a restructuring of News Corp.'s massive $7.6 billion debt load initiated last fall, may have prevented the collapse of Rupert Murdoch's global media empire.

Recessions in the company's three primary markets—the U.S., U.K. and Australia—added to Mr. Murdoch's headaches in the past year.

The company that built a mountain of debt throughout the 1980s by paying top dollar to acquire such media properties as *TV Guide* and 20th Century Fox Film Corp., is now focusing on lowering its debt and operating its core businesses.

That strategy was underscored by the sale in June of eight consumer magazines and the *Daily Racing Form* to K-III Holdings for $650 million. The sale reduced News Corp.'s U.S. magazine holdings to *TV Guide*, which it refused to sell, and the money-losing *Mirabella*, which K-III refused to buy.

Soon after announcing the K-III sale, News Corp. ceased publication of the U.K. edition of *Mirabella* and said it was open to discussing the sale of other U.K. titles. In August, it sold *New Woman*, *Car* and *Supercar & Classics* to U.K. publisher EMAP for $17 million. Mr. Murdoch continues to publish the U.K edition of *TV Guide* and *Sky Magazine*, jointly owned by News Corp. and Hachette S.A.

The U.S. *TV Guide* has been battered by a prolonged ad page and circulation slide. In July, it lowered its rate base 3.8% to 15.2 million, citing slumping single-copy sales. One reason for the decline at newsstand could be the lack of ad spending: Media support totaled just $4.2 million for the magazine, down from $18.7 million and a shadow of 1988's $36.5 million. The drop was a result of the magazine ending a long-running barter arrangement with local TV stations.

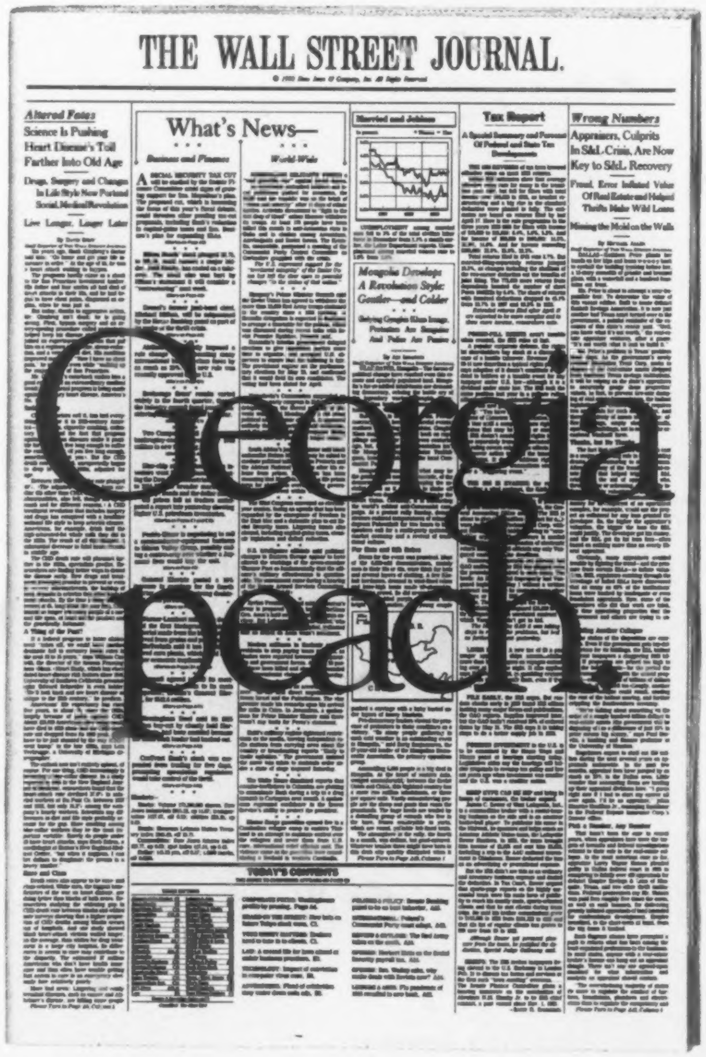
TV Guide recently asked Chiat/Day/-Mojo and BBDO Worldwide to compete for a new $20 million to $25 million consumer account aimed at steadying circulation declines.

Movie studio 20th Century Fox finished the year ranked third, with a 14% box office share in North America, up from 6% and sixth-place finish, according to *Variety*. "Home Alone" has taken in about $281 million to date, making it the No. 3 movie of all time. Fox also got strong performances from "Die Hard 2" and "Sleeping With the Enemy."

In December, the studio hired Joel Hochberg, former president of DDB Needham Worldwide's Chicago office, as president of domestic marketing, with the goal of adding more sophistication to its movie marketing efforts.

The studio increased media spending last year 48.0% to $78.4 million, distributed primarily between newspapers and network and spot TV. "Home Alone" and "Die Hard 2" got the most media support —$11.6 million and $11.1 million, respectively.

The Fox TV network appeared to lose momentum in the past year. Its average household Nielsen rating fell 2% to 6.4 for the 1990-91 season and it wrote just $400 million in upfront business, down 20%. The network has a lock on younger demographics with a median age of 28 (CBS's is 44). Fox introduces new shows throughout the year instead of just during the fall season, and spreads promotion dollars accordingly.



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HEADQUARTERS

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News America Publishing/1211 Avenue of the Americas/New York, N.Y. 10036/Phone: (212) 852-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Rupert Murdoch, ceo/chmn-News America Publishing; Leslie Hinton, pres-News America Publishing; Barry Diller, chmn-Fox Inc.; Greg Mathanson, pres-Fox TV Stations; Bill Schereck, vp-Fox Cable Programming; Jamie Kellner, pres-coo, Fox Broadcasting Co.; George Craig, ceo-HarperCollins Publishers.

News America Publishing, Fox TV Stations, Fox Broadcasting, HarperCollins Publishers: In-house. Leon Hertz, exec vp-News America Publishing/vp-global mktg, News Corp. Ltd.

TWENTIETH CENTURY FOX FILM CORP.: Joe Roth, chmn.

Young & Rubicam, New York/Los Angeles. Nancy Smith, exec vp.

RANK: 58

Nike Inc.

Beaverton, Ore.
Ad spending: **$178.8** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	24,887	18,930	31.5
Sunday magazine	133	2	6,900.0
Newspaper	290	330	(12.1)
Outdoor	234	292	(20.0)
Network TV	42,769	24,206	76.7
Spot TV	5,995	1,291	364.5
Syndicated TV	7,656	3,428	123.3
Cable TV networks	5,735	2,385	140.5
Spot radio	1	466	(99.8)
Measured media	87,700	51,328	70.9
Unmeasured	91,100	53,300	70.9
Total	178,800	104,628	70.9
By top brands	**1990**	**1989**	**% chg**
Nike sporting footwear	69,300	31,064	123.1
Nike sportswear	8,209	14,166	(42.1)
Cole-Haan shoes	5,289	1,887	180.2

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	3,004	2,235	34.4
Earnings	287	243	18.1
U.S.	**1991**	**1990**	**% chg**
Sales	2,151	1,760	22.2
Operating income	325	315	3.2
Division sales	**1991**	**1990**	**% chg**
Athletic footwear	1,676	1,369	22.4
Non-athletic footwear	139	121	14.9
Apparel	326	266	22.6
Foreign	862	480	79.6

CORPORATE PROFILE

After widening its market share lead over Reebok International to 7.7 percentage points in 1990, Nike this year began looking overseas for growth.

Nike, the leading U.S. athletic shoe brand, in February began a $20 million, 60-day global introduction of the Air 180 running shoe. The Air 180 was Nike's first global product launch and believed to be the first in the athletic shoe industry.

The U.S. athletic shoe market grew 20% to 25% annually in the mid-1980s, but growth is expected to slow to 6% to 7% this year.

Domestically, Nike sprinted past archrival Reebok International in 1990, increasing its share of the $5.5 billion U.S. athletic shoe market to 28.4%, while Reebok's share fell to 20.7%.

Driving its increased sales was a whopping 70.9% increase in media spending to $87.7 million. Spending for Nike brand footwear and apparel mirrored that, rising 71.6% to $78.3 million.

Still, the battle between Nike and Reebok is expected to tighten this year, due to strong sales for Reebok's Pump and the recession, which has softened the $60-to-$90 segment of the market where Nike does most of its business.

Nike last year boosted its spending for Nike brand women's shoes and apparel 78.6%, to $7.2 million. To further appeal to fashion-conscious young women, Nike this spring relaunched its Side 1 brand of shoes and apparel. Side 1 was originally introduced in 1989 as a fitness-inspired casual line but was reworked as an athletic shoe line designed to appeal to teens and less serious sports participants.

Nike also turned the injury to spokesman Bo Jackson into an advantage. Nike garnered millions of dollars in free media attention by teaming Mr. Jackson with another athlete who made an incredible comeback, boxer George Foreman, in a splashy 60-second "Bo Knows" commercial called the "Bo Show."

HEADQUARTERS

Nike Inc./One Bowerman Dr./Beaverton, Ore. 97005/Phone: (503) 671-6453.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Tom Clarke, vp-gm, sports & fitness brand; Andy Mooney, vp-prod mktg; Stephen Gomez, vp-core categories; Scott Bedbury, dir-adv; Tim O'Kennedy, dir-intl mktg; Ron Nelson, vp-sports casuals; Nancy Monsarrat, dir-adv, sports casuals.

Nike, Side 1: Wieden & Kennedy, Portland, Ore. John Russell, mgmt super.

Broadcast media buying: Nike, Side 1: SFM Media, New York. Bill Barrett, sr vp-dir, client svcs.

Ethnic mktg: Nike, Side 1: Muse Cordero Chen, Los Angeles. Jo Muse, pres.

I.a.: Cole & Weber, Seattle. Jon Dietrich, acct mgr.

COLE-HAAN: Cathy Taylor, vp-retail.

RANK: 27

Nissan Motor Co.

Tokyo
Ad spending: **$410.2** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	50,150	31,339	60.0
Sunday magazine	1,066	836	27.6
Newspaper	12,368	5,321	132.4
Outdoor	1,808	391	362.0
Network TV	125,792	73,425	71.3
Spot TV	108,189	113,502	(4.7)
Syndicated TV	17,237	4,936	249.2
Cable TV networks	4,821	2,321	107.8
Spot radio	2,013	4,971	(59.5)
Measured media	323,445	237,043	36.5
Unmeasured	86,800	63,600	36.5
Total	410,245	300,643	36.5
By top brands	**1990**	**1989**	**% chg**
Nissan cars	197,660	173,750	13.8
Infiniti cars	40,166	32,755	22.6
Nissan trucks & vans	38,246	24,466	56.3

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	42,300	40,000	5.8
Earnings	340	823	(58.7)

CORPORATE PROFILE

Despite intense competition and a stale lineup lacking new models, Nissan Motor Corp. USA maintained its share of the U.S. car/truck market during 1990 while localizing its national marketing plan.

Financial returns were less accommodating corporatewide. Profits at parent Nissan Motor Co., Tokyo, plummeted far below the "slight" decline expected as losses from the bankruptcy of a 43%-owned supplier affiliate, Ikeda Bussan Co., were a major culprit. Earnings aren't expected to rebound until 1993 when new models go to market.

Nissan division's 1990 U.S. car/truck unit sales (imported and domestic production) slipped 9.7% to 597,643 for a 4.3% share of the car/truck market, down from 4.5%. The Infiniti division accounted for 23,960 units and a 0.2% share of the total car/truck market.

Emphasizing that it has quit chasing Honda and Toyota for volume sales, the Nissan division focused on adding new regional marketing managers and giving them vastly increased marketing budgets. Each region is responsible for development and implementation of its own marketing plan to run with the national plan from agency Chiat/Day/Mojo.

Nissan division plans to sell 700,000 vehicles annually in the U.S. by 1993, and maybe 1 million annually by 1995, after new capacity comes on line at its plant in Smyrna, Tenn.

The $40,000 Q45 was Infiniti's bestseller at 13,911 units, followed by the $24,500 M30 model at 6,603 units and the newest addition introduced last Septem-

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ber, the $17,750 G20 midsize luxury sedan, accounting for 3,446 units. A convertible M30 model debuted this February.

Sales of Nissan's best-selling Sentra, an entry-level subcompact, accounted for 159,054 units. A rise in Sentra sales had the support of an estimated $45 million in measured media for 1990, up about 200%.

Media spending by Nissan generally was up across the board for all nameplates, totaling $323.4 million, up 39.3%. These expenditures don't include spending by dealer associations or dealer leasing programs, which totalled $80 million. Nissan's contribution to that spending is folded into its unmeasured ad total.

The top-of-the-line Maxima was backed by $14.5 million in media advertising, down from $35 million.

After relating the upscale Infiniti to abstract images of rocks, trees and solitary shorelines, agency Hill, Holliday, Connors, Cosmopulos took a more product-specific approach. New TV spots mixed art and technology to position the car as a blend of luxury and performance. Media spending reached $40.2 million, up 22.6%.

To support the national launch of Sentra, largest in Nissan history, the company continued its "Fantasy" campaign into its second year.

The dreamlike scenarios, featuring various Nissan models, have proved effective in forming positive perceptions of the brand. Sentra drew $48 million in media spending, up from $18.5 million spent during the initial introductory period in 1989.

Into the 1991 model year, Nissan sought to spark slumping sales by cutting into budgets to find an extra $50 million to put into a three-month incentive program.

HEADQUARTERS

Nissan Motor Corp. USA/P.O. Box 191/Gardena, Calif. 90247-7635/Phone: (213) 532-3111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Haruo Ohno, pres-Nissan N. Amer.; Tom D. Mignanelli, pres-Nissan Motor Corp. USA; Robert J. Thomas, vp-corp strategy/resource devel.

NISSAN DIV: Earl Hesterberg, vp-gm; Ron Hannum, genl mktg mgr; John Rinek, natl adv mgr; Karen Gustafson, adv media mgr; William Bivens, merch mgr.

Chiat/Day/Mojo, Venice, Calif. Tom Patty, exec vp-acct dir.

INFINITI DIV: Hilliam Bruce, vp-gm; Robert Paske, genl mktg mgr; Jack Collins, adv mgr; Brian O'Malley, merch mgr; John Nystrom, regional mktg mgr.

Hill, Holliday, Connors, Cosmopoulos, Marina Del Rey, Calif. Terry Foutz, sr vp-acct dir.

RANK: 94

Nynex Corp.

New York

Ad spending: **$121.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	7,522	6,910	8.8
Sunday magazine	838	1,248	(32.9)
Newspaper	17,813	14,843	20.0
Outdoor	272	213	27.9
Network TV	87	0	NA
Spot TV	32,351	33,260	(2.7)
Syndicated TV	0	22	NA
Cable TV networks	355	266	33.4
Spot radio	3,952	6,041	(34.6)
Measured media	63,189	62,804	0.6
Unmeasured	58,300	57,900	0.7
Total	121,489	120,704	0.7
By top brands	**1990**	**1989**	**% chg**
New York Telephone Co.	17,190	15,138	13.6
Corporate spending	16,845	15,639	7.7
New England T&T Co.	12,786	15,216	(16.0)
Nynex Information Resources Co.	8,655	10,130	(14.6)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	13,585	13,211	2.8
Earnings	949	808	17.5
Division sales	**1990**	**1989**	**% chg**
Local service	5,651	5,494	2.9
Long distance	1,365	1,411	(3.2)
Network access	3,292	3,293	(0.0)
Other	3,277	3,013	8.8

CORPORATE PROFILE

Nynex Corp. late this year has been examining its media buying practices with possible intent to consolidate more than $63.1 million in buying. Media is now purchased by seven agencies.

The move follows the assignment of the $20 million corporate account to Ogilvy & Mather from Young & Rubicam. The same consultancy brought in to help Nynex in the agency review process is involved in the media evaluation.

Nynex, which underwent restructuring in 1990, now consists of two principal groups: Telecommunications, whose operating units include two telephone companies; and Worldwide Services, housing Nynex Mobile Communications, software and consulting businesses and Nynex Network Systems Co.

Apart from corporate advertising, Nynex spent the most on New York Telephone, $17.1 million, up 13.6%.

New England Telephone advertising dropped 16% to $12.8 million. This year it launched Signaling System 7 software into the network to expand the availability of new services such as Nynex Phonesmart services, including Caller ID service.

Information Resources Co. media spending dropped 14.6% to $8.7 million. The unit publishes more than 300 white pages and Yellow Pages directories a year.

HEADQUARTERS

Nynex Corp./335 Madison Ave./New York, N.Y. 10017/Phone: (212) 370-7400.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Matthew Stover, vp-public affairs/corp comms; Joan Walker, mg dir-mktg comms.

Corporate adv: Ogilvy & Mather, New York. Steve Harty, sr vp-exec grp dir.

NEW YORK TELEPHONE: Pat Mulhern, vp-public affairs/corp comms; Michael Clendenin, mg dir-public affairs; Jerome Cadigan, dir-adv.

Public Telephone, Public Telephone direct, direct mail, various programs: Grey Direct, New York. Margaret Myhan, acct super.

Direct Mail: Chapman Direct Advertising, New York. Rosemary O'Brien, vp-mgmt super.

Hispanic mktg: Conill Advertising, New York. Larry Shapiro, vp-grp dir.

Business & residential adv: Young & Rubicam, New York. Larry Shapiro, vp-grp dir.

NEW ENGLAND TELEPHONE: James Crain, vp-external affairs; Geraldine O'Brien, mg dir-adv.

Business & residential adv: Cabot Communications, Boston. Carolyn Smith, sr vp-mgmt super.

Residential direct mail: Cabot Direct, Boston. Suzanne Delice, vp-mgmt super.

General & business direct mail: Dickinson Printing & Mailing, Quincy, Mass. Reid Dickinson, pres.

Business direct mail: Rapp, Collins, Marcoa, Boston. Karen Zahorsky, vp-mgmt super.

NYNEX INFORMATION RESOURCES CO.: Donald Mackenzie, pres; Bernie Bloomfield, vp-mktg.

Yellow Pages: Chiat/Day/Mojo, New York. Mary Maroun, mgmt super-vp.

Hispanic mktg: Conill Advertising, New York. Marisol Estay, acct exec.

NYNEX MOBILE COMMUNICATIONS: Dennis McManus, vp-N.Y. metro; Cynthia Woodyard, mgr-adv/promo, Upstate N.Y.-W. Mass; Lisa Clarey, mgr-adv/promo, New England Cellular Provider.

Collaterals: Lohmeyer Simpson Inc., Morristown, N.J. Valerie Moody, acct exec.

Upstate N.Y. & Western Mass.: Schnurr & Jackson, Albany, N.Y. Jesse Jackson, vp.

New England Cellular Provider: Leonard, Monahan, Lubars & Partners, Providence, R.I. Scott White, account exec.

RANK: 64

Paramount Communications

New York

Ad spending: **$162.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	4,615	2,513	83.7
Sunday magazine	63	29	120.2
Newspaper	25,540	24,066	6.1
Outdoor	1,544	71	NA
Network TV	23,838	24,645	(3.3)
Spot TV	25,667	20,612	24.5
Syndicated TV	8,427	7,658	10.0
Cable TV networks	4,438	3,205	38.5
Network radio	703	829	(15.2)
Spot radio	3,346	1,816	84.2
Measured media	98,182	85,444	14.9
Unmeasured	64,100	55,800	14.9
Total	162,282	141,244	14.9
By top brands	**1990**	**1989**	**% chg**
Paramount Pictures	85,888	68,556	25.3

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	3,869	3,392	14.1
Earnings	259	1,465	(82.3)
Division sales	**1990**	**1989**	**% chg**
Entertainment	2,447	2,072	18.1
Publishing	2,072	1,320	57.0

CORPORATE PROFILE

Paramount Communications, which completed its first full fiscal year as an entertainment/media company in 1990, finds itself a hit-driven business, with fewer hits than misses.

Its business segments now live or die by the fickle nature of public taste. The company posted back-to-back losses for the first two quarters of this fiscal year, ending Oct. 31, 1991, and, as such, its efforts to expand have been constrained.

Escalating costs associated with movie production and marketing helped depress results from Paramount Pictures.

The film business' biggest success, "Ghost," took the company by surprise. While expected to do well, "Ghost" was never targeted as the $200 million-plus blockbuster it became. Because of the film's longevity as a first-run feature (more than six months), ad spending hit $14.7 million, well above the $9.2 million used to hype "Days of Thunder," the film with the second-highest ad budget.

Produced for an estimated $50 million, "Days of Thunder" failed to break the all-important $100 million mark at the box office for a "blockbuster," though filled with product placement and teamed with promotional partners.

Paramount this year began a generic campaign for all its summer releases. The studio teamed with Kmart Corp. and other marketers for a summer program called "Passport to Summer Entertainment." Participating theater chains planned to distribute 20 million game cards, which could be redeemed for discounts on Paramount Home Video products at more than 2,000 Kmart stores and free prizes from Hardee's Food Systems, Goodyear Tire & Rubber Co., Chrysler Corp., and Costa Cruises.

With 17 films released in calendar 1990, Paramount Pictures ranked second in its share of the U.S. and Canadian box office at 15%. In the previous year, the company released 14 features and ended the year with a 14% share, placing it fourth, according to *Variety*.

However, its share of the domestic box office dropped to 8.3% with seven films during the first half of this calendar year. To help the studio regain its position, Paramount Pictures hired NBC-TV wunderkind Brandon Tartikoff as chairman in July.

Media spending for the publishing operations increased 74.6% to $5.6 million in 1990, with the majority allocated to the Simon & Schuster imprint.

HEADQUARTERS

Paramount Communications, Inc./15 Columbus Circle/New York, N.Y. 10023-7780/Phone: (212) 373-8000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Nick Ashooh, vp-corp comms.

MOTION PICTURE GRP.: Arthur Cohen, pres-worldwide mktg; Nancy Goliger, exec vp-mktg/creative affairs; Michael Camp, Lucia Ludovico, sr vps-creative adv; Thomas Campanella, exec vp-natl adv/promo; Ron Hein, vp-mktg admin; Jerry A. Meadors, vp-mktg svcs; Leslie Pound, sr vp-intl mktg; Alfa Tate, sr vp-mktg; Susan Wrenn, vp-natl adv.

Ogilvy & Mather, Los Angeles. Ernie Shapiro, vp-acct super.

TELEVISION GRP.: Meryl Cohen, sr vp-adv/promo, Domestic TV; John Wentworth, vp-adv/promo/publicity, Network TV; Hollace Brown, sr vp-adv/sales promo, Network TV; Alan Perper, sr vp-mktg, Home Video.

Domestic TV: Jacobs & Gerber, Los Angeles. Ray Jacobs, Susan Kantor, acct dirs.

Network TV: Grey Advertising, New York. Gerry Logue, acct dir.

Home video: J. Walter Thompson USA, Los Angeles. Michael Arkin, vp-acct super. 90% (for Design), Hollywood, Calif. Henry Vizcarra, pres.

MADISON SQUARE GARDEN: Linda Burns vp-mktg, Entertainment & Attractions Grp.; Lee Berke, vp-mktg, MSG Network.

Madison Square Garden Network: Burkhardt & Christy Advertising, New York. Don Kurn, sr vp-mgmt super.

SIMON & SCHUSTER: Judith Press Brenner, sr vp-dir, corp comms/mkt planning.

Simon & Schuster trade div., Simon & Schuster, Pocket Books, Summit Books: Franklin Spier, New York. Rhonda Hall, vp-acct exec.

Prentice Hall Press: Design Source East, Hackensack, N.J. Carolyn Maletta, vp.

Prentice Hall School: Whitman Studios, Clinton, N.J. Jim Whitman, pres.

Modern Curriculum Press: Belden, Frenz & Lehman, West Lake, Ohio. Jerry Fenton, pres.

Simon Systems Intl.: Marketel; Foster/McCann-Erickson, Montreal. John Woodfine, acct exec.

Simon & Schuster Human Resources: Tempo Advertising, New York. Irene Goldsmith, acct exec.

RANK: 28

J.C. Penney Co.

New York

Ad spending: **$393.8 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	14,616	13,983	4.5
Sunday magazine	1,004	2,254	(55.5)
Newspaper	70,631	81,379	(13.2)
Outdoor	75	37	100.0
Network TV	41,427	31,494	31.5
Spot TV	9,676	6,613	46.3
Syndicated TV	2,434	2,536	(4.0)
Cable TV networks	1,090	1,134	(3.9)

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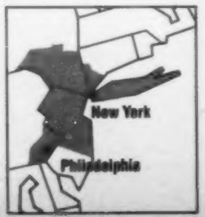

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U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Network radio	6,747	11,864	(43.1)
Spot radio	5,882	7,621	(22.8)
Measured media	153,581	158,914	(3.4)
Unmeasured	240,200	248,600	(3.4)
Total	393,781	407,514	(3.4)
By top brands	**1990**	**1989**	**% chg**
Penney's apparel	62,286	59,598	4.5
Penney's general	48,109	48,673	(1.2)
Penney's household	15,952	18,453	(13.6)
Penney's jewelry	11,661	10,719	8.8

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	16,365	16,103	1.6
Earnings	577	802	(28.1)
Division sales	**1990**	**1989**	**% chg**
J.C. Penney stores	14,616	14,469	1.0
Catalog	3,220	3,205	0.5
Drugstores	1,097	987	11.2

CORPORATE PROFILE

J.C. Penney Co. is rethinking its strategy for transforming itself into a fashion department store.

The nation's fourth-largest retailer has been hit hard by the recession: Same-store sales were down 0.3% and catalog dropped 0.5% for the fiscal year ended Jan. 31, 1991. The drop has been more precipitous the first six months of this fiscal year, with same-store sales off 4.2% and catalog sales off 8.1%.

The marketer in June '91 fired N W Ayer, its agency for eight years, and moved its estimated $45 million to $60 million account to Bozell without a review. Bozell had been agency of record for the J.C. Penney Shopping Channel, sold in 1991.

Penney's is expected to introduce a new campaign and theme line in early 1992, replacing Ayer's "Fashion comes to life," introduced in 1990. The company will likely push quality and value in its merchandising and future campaigns.

Analysts point to Penney's deal with Revlon to establish 420 in-store Beauty Stop boutiques as an example of where the retailer will be headed in the '90s.

HEADQUARTERS

J.C. Penney Co./14841 N. Dallas Parkway/Dallas, Texas 75240-6760/Phone: (214) 591-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: W. Barger Tygart, exec vp-dir merch; Ronald Shuler, dir-mktg comms; Dean Erickson, sales plans mgr; Edward Hayward, adv mgr; K.L. Baker, dir-merch/publicity/special events; Dave Nafziger, dir-visual merch; Don Hoggatt, visual merch design dir; Robert Burke, controller-merch; James L. Hailey, pres-Women's Div.; Marshall Beere, Marilee Cumming, Gerry Shores, vps-dirs, mktg/merch-Women's Div.; Thomas D. Hutchens, pres-Men's Div.; J. Raymond Pierce, Dave Fulcomer, div vps-dirs merch, Men's Div.; Henry H. Scott, pres-Children's Div.; Andrew Cumming, Tice Segal, div vps-dirs merch, Children's Div.; James J. Kennedy, pres-Home & Leisure Div.; J. Thomas Arthur, div vp-dir mktg, Home & Leisure Div.

J.C. Penney Stores & products: Bozell, Irving, Texas. Dennis Visich, dir-client svcs.

UNITS: Cathy Edwards, adv dir.

In-house.

THRIFT/TREASURY DRUGSTORES: Trish Orchard, ad mgr.

Marx Fairman, Glendale, Wis. David Marx, acct super.

RANK: 6

PepsiCo

Purchase, N.Y.

Ad spending: **$849.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	9,048	3,010	200.6
Sunday magazine	82	32	160.1
Newspaper	4,923	7,229	(31.9)
Outdoor	4,893	3,681	32.9
Network TV	193,447	168,815	14.6
Spot TV	284,602	264,648	7.5
Syndicated TV	18,001	10,062	78.9
Cable TV networks	13,119	9,741	34.7
Network radio	2,682	5,823	(53.9)
Spot radio	16,167	33,382	(51.6)
Measured media	546,964	506,422	8.0
Unmeasured	302,100	279,700	8.0
Total	849,064	786,122	8.0
By top brands	**1990**	**1989**	**% chg**
Kentucky Fried Chicken	118,406	118,594	(0.2)
Pizza Hut restaurants	106,951	95,184	12.4
Taco Bell restaurants	81,096	65,399	24.0
Pepsi beverages	79,412	75,387	5.3
Diet Pepsi beverage	76,471	58,952	29.7
Doritos snacks	24,621	21,466	14.7
Frito snacks	22,111	10,614	108.3
Mountain Dew beverage	11,690	10,244	14.1
Slice beverages	9,725	11,888	(18.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	17,803	15,242	16.8
Earnings	1,091	901	21.1
U.S.	**1990**	**1989**	**% chg**
Sales	14,047	12,519	12.2
Operating profits	1,853	1,602	15.7
Division sales	**1990**	**1989**	**% chg**
Soft drinks	6,523	5,777	12.9
Snack foods	5,054	4,215	19.9
Restaurants	6,226	5,251	18.6

CORPORATE PROFILE

Price wars, competitive encroachment and an ailing economy have triggered marketing moves at PepsiCo ranging from massive layoffs at its big profit generator, Frito-Lay, to a wave of new "health" products in all its segments.

PepsiCo took draconian measures to prop up Frito-Lay this month by laying off 7% of its workforce. The move will allow Frito-Lay, locked in a price-cutting war raging throughout the snack-food industry, to keep its prices low against further encroachment from Borden Inc. and Anheuser-Busch Cos.

Frito-Lay is critical to PepsiCo. The subsidiary, which holds 50% of the $9.7 billion snack-chips segment, accounted for 42% of PepsiCo's operating profits in 1990. F-L's U.S. profits dropped 9% in the second quarter '91 with no improvement expected the rest of the year.

PepsiCo's restaurant unit has led the new-product surge, although not without a hitch. Kentucky Fried Chicken Corp., now known by its initials KFC, has found the national rollout of SkinFree Crispy chicken meeting with limited success. The product's poor performance led PepsiCo to take a third-quarter '91 charge against earnings. KFC also is selling Honey BBQ Wings in some markets.

KFC, which commands about half the $6.4 billion U.S. quick-service chicken restaurant business, had 5% growth in same-store sales last year. That compared with a 13% boost in same-store sales at Taco Bell and 7% at Pizza Hut.

KFC's ad budget remained flat. But big gains in ad spending at Taco Bell (up 24%) and Pizza Hut (up 12.4%) boosted PepsiCo's overall media buying for its restaurant chains by 10% to $307 million.

In April, Taco Bell, which holds 70% of the Mexican-style restaurant market, introduced nationally four low-price, low-calorie chicken products, further extending the company's value menu. Then in June, came the 39¢ Fiesta Menu "snack size" fare supported by $12 million in spot and cable TV.

Pepsi-Cola Co. expanded in non-soft-drink beverage categories introducing into test All Sport, an isotonic; H2Oh!, a sparkling water; and Wild Bunch, a line of naturally flavored colas.

The growing diet segment posted case sales increases of 8.9% and a growth of 1.5 share points to 29.4% of the total soft-drink market, according to John C. Maxwell Jr. of Wheat, First Securities. No. 2 Diet Pepsi advanced 0.4 points to a 21% share, he said, while its case sales advanced 11.4%.

Meanwhile, No. 1 Diet Coke dropped 0.5 points to 31% of the diet segment as its case sales grew 7.5%. In the overall soft-drink market, Diet Coke was No. 3 at a 9.1% share and Diet Pepsi No. 4 at 6.2%. Diet Pepsi got a 29.7% boost in media spending to $76.5 million.

An upbeat TV campaign for Diet Pepsi featuring Ray Charles singing the new tagline, "You got the right one baby, uh-huh," broke in January.

The regular Pepsi brand didn't fare as well. It dropped 0.5 share points to 17.3% to rank No. 2 in the overall market, compared with nemesis Coca-Cola Classic, which slid only 0.1 points and still holding a leading 19.4% share.

Frito-Lay in 1990 went national with a "light" line of low-oil snacks, under the Doritos, Chee-tos and Ruffles names, supported with nearly $13 million in media. This February Frito's corn chip got a network TV campaign targeting younger consumers. F-L plans to double Frito spending to about $8 million in '91. Spending on its snack foods rose 23.5% in 1990 to $60 million.

HEADQUARTERS

PepsiCo/Anderson, Hill Rd./Purchase, N.Y./Phone: (914) 253-2000.

PERSONNEL, BRANDS, AGENCIES

PEPSI-COLA NORTH AMERICA: Craig E. Weatherup, pres-ceo; David Novak, exec vp-mktg/natl sales; Michael Lorelli, pres, Pepsi-Cola East; Ronald W. Tidmore, pres, Pepsi-Cola South; Mauricio Pages, pres, Pepsi-Cola Central; Christopher M. Hallenback, pres, Pepsi-Cola West; Brian Swette, vp-natl mktg; Frank Rupp, vp-design/visual comms; Rick Rock, vp-media/entertainment.

Pepsi-Cola, Diet Pepsi, Slice, Mountain Dew, All Sport: BBDO Worldwide, New York. William Katz, exec vp-worldwide sr acct dir.

Mug root beer: Lois/GGK, New York. Mark Rothman, mgmt super.

African-American adv: Lockhart & Pettus, New York. David Harris, sr vp-dir client svcs.

Hispanic adv: Siboney Advertising, New York. Luis Nasr, vp-gm.

Pepsi-Cola: on-premise/field mktg & adv: Tracy-Locke, Dallas. Mike Rawlings, gm.

FRITO-LAY: David J. Gustin, sr vp-mktg.

Ruffles potato chips, Fritos corn chips, Chee-tos cheese flavored snacks: DDB Needham Worldwide, Chicago. Dawn Hudson, grp acct dir.

Doritos and Tostitos tortilla chips, Lay's potato chips, Crunch Tators potato chips, Frito-Lay dips, Rold Gold pretzels, Funyun's onion snacks, Smartfood popcorn: Tracy-Locke, Dallas. Mike Rawlings, gm-coo.

Sunchips multigrain snacks: BBDO Worldwide, New York. Andy Russem, sr vp-acct dir.

PIZZA HUT INC.: Robert J. Perkins, sr vp-mktg; Terry Davenport, vp-segment mktg.

BBDO Worldwide, New York. Bill Gray, sr vp-acct dir.

TACO BELL: Tim Ryan, sr vp-mktg; Karen Eadon, vp-mktg svcs & adv.

Foote, Cone & Belding, San Francisco. Dan

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Source: MRCDA, 1990.

Nation's Business
The Small Business Adviser

Odishoo, grp mgmt super.

KENTUCKY FRIED CHICKEN CORP.: William J. McDonald, sr vp-mktg; Colin W. Moore, vp-mktg/operations devel, intl; Peter J. Foulds, vp-adv; Ed McPherson, vp-field mktg; Thomas A. Cross, vp-mktg svcs.

Young & Rubicam, New York. John Swan, sr vp-grp dir, domestic; Norman Kappler, sr vp-mgmt super, intl.

RANK: 40

Pfizer Inc.

New York

Ad spending: **$279.9** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	30,189	22,880	31.9
Sunday magazine	1,302	1,115	16.7
Newspaper	1,142	159	618.6
Network TV	70,184	62,623	12.1
Spot TV	5,553	5,580	(0.5)
Syndicated TV	3,259	1,835	77.6
Cable TV networks	2,236	1,137	96.7
Network radio	32	0	NA
Spot radio	878	1,148	(23.5)
Measured media	114,775	96,477	19.0
Unmeasured	165,100	138,800	18.9
Total	279,875	235,277	19.0
By top brands	**1990**	**1989**	**% chg**
Plax mouth rinse	21,056	19,619	7.3
Visine eye drops	14,516	14,614	(0.7)
Lady Stetson perfume	8,163	7,144	14.3
Stetson men's toiletries	7,629	8,860	(13.9)
Unisom	7,618	6,261	21.7
exclamation! perfume	7,532	7,446	1.1
Ben-Gay products	7,522	4,344	73.2
Preferred Stock	6,585	0	NA

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	6,406	5,672	13.0
Earnings	801	681	17.6
U.S.	**1990**	**1989**	**% chg**
Sales	3,473	3,097	12.2
Operating profit	736	564	30.4
Division sales	**1990**	**1989**	**% chg**
Healthcare	4,336	3,629	19.5
Consumer products	668	628	6.5
Animal health	510	489	4.3
Specialty chemicals	548	509	7.5
Specialty minerals	344	416	(17.4)

CORPORATE PROFILE

Pfizer launched its first consumer educational campaign touting the cardiovascular drug Procardia XL, a new version of its Procardia.

Procardia and its XL line extension claimed 22.5% of Pfizer Inc.'s pharmaceutical sales of $3.2 billion. XL, in its first full year on the market, generated $404 million in U.S. sales.

The $2.9 million campaign ran in magazines, newspapers and Sunday magazines. Procardia is the most widely prescribed cardiovascular drug in the U.S., according to the company.

With Procardia coming off patent the end of this year and Pfizer facing generic competition, the campaign seeks to educate both doctors and patients to the advantages of XL over its predecessor. XL is the only once-daily calcium channel blocker approved in the U.S. for angina and hypertension.

Pfizer has six new ethical drugs under regulatory review and expects to introduce them during the next 24 months.

Consumer products, accounting for 10.4% of Pfizer worldwide sales in 1990, were paced in ad spending by Plax prebrushing dental rinse. Plax received $21 million in media, up 7.3%.

Pfizer aggressively pushed Plax into worldwide distribution in 1990. The expenses associated with that expansion highly influenced the consumer segment's 34% decline in operating profit. Plax contributed $178.7 million in sales, up 34%. During the year, Pfizer expanded Plax's presence from 17 to 39 countries.

Visine eye drop brand got a Visine L.R. line extension (for long-acting relief). Pfizer spent $1.6 million to introduce the line, virtually all in network TV.

Ben-Gay arthritic ointment showed a 73.2% increase in media spending to $7.5 million for the year, although the company says Ben-Gay didn't meet sales expectations. This summer the line got an Ultra Strength Ben-Gay version.

The Coty division turned in a 10% growth in sales despite increased competition and a weak retail sector. The increase was due partly to the introduction of Preferred Stock fragrance for men and a women's fragrance, L'Effleur. As in the past, the Coty division funneled most of its ad dollars into network TV. The four most popular scents, Lady Stetson, exclamation!, Iron and Stetson for men, plus the newcomer, Preferred Stock, had combined media support of $32.7 million, of which 73% was in network TV and the rest divided between spot and syndicated TV.

HEADQUARTERS

Pfizer Inc./235 E. 42nd St./New York, N.Y. 10017/Phone: (212) 573-2323.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Edmund T. Pratt Jr., chmn-ceo; William C. Steere Jr., pres-ceo.

Media buying: Adforce Inc., New York (in-house). Robert J. Geller, pres; John M. McAvity, vp-bdcast; Martin J. Gennusa, vp-media.

PFIZER ANIMAL HEALTH GRP.: M. William Roche, pres.

Pfizer Animal Health products-domestic: Dudnyk, Horsham, Pa. Tom Waller, acct super.

Intl: Advocin, Dectomax: Dorritie, Lyon & Nickel, New York. Marty McNamara, vp-acct super.

Intl: Aviax, other Pfizer Animal Health products: Bergelt Litchfield, New York. Kathy Weitze, acct super.

PFIZER CONSUMER PRODS.-CONSUMER HEALTHCARE: Joseph F. Harmon, pres-consumer prods grp.

Ben-Gay, Barbasol: Ally & Gargano, New York. Jim Roxbury, vp-acct dir.

Visine: Backer Spielvogel Bates, New York. Mark Morris, exec vp.

Desitin, Rid: Sweeney & Partners, New York. Mike Monroe, acct exec.

Unisom: Avrett, Free & Ginsberg, New York. Don Bandman, exec vp-grp acct dir.

Oral Care-Plax: Ally & Gargano, New York. Dick Mullan, Regina Woods, acct execs.

COTY DIVISION: J.L. Abernathy, exec vp.

Stetson, Lady Stetson, Preferred Stock, Iron, exclamation!, Overnight Success: Ketchum Advertising, New York. Teddy Borsen, acct exec.

RANK: 2

Philip Morris Cos.

New York

Ad spending: **$2,210.2** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	260,044	281,511	(7.6)
Sunday magazine	15,420	14,973	3.0
Newspaper	19,915	29,682	(32.9)
Outdoor	77,161	70,867	8.9
Network TV	402,238	368,373	9.2
Spot TV	221,216	180,748	22.4
Syndicated TV	133,757	106,803	25.2
Cable TV networks	26,607	20,492	29.8
Network radio	14,481	8,778	65.0
Spot radio	28,895	42,714	(32.4)
Measured media	1,199,733	1,124,941	6.6
Unmeasured	1,010,500	947,500	6.6
Total	2,210,233	2,072,441	6.6
By top brands	**1990**	**1989**	**% chg**
Miller beer	181,354	158,362	14.5
Post cereals	110,998	102,005	8.8
Maxwell House coffees	92,604	76,804	20.6
Marlboro cigarettes	85,376	100,751	(15.3)
Kraft cheeses	76,641	57,681	32.9
Kraft salad dressing/mayonnaise	56,923	51,463	10.6
Virginia Slims cigarettes	44,214	44,361	(0.3)
Merit cigarettes	37,035	54,222	(31.7)
General Foods Int'l coffee	36,863	30,628	20.4
Jell-O gelatins & puddings	29,366	30,682	(4.3)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	51,169	44,080	16.1
Earnings	3,540	2,946	20.2
U.S.	**1990**	**1989**	**% chg**
Sales	36,014	33,178	8.5
Operating profit	6,715	6,061	10.8
Division sales	**1990**	**1989**	**% chg**
Domestic tobacco	10,370	9,474	9.5
International tobacco	10,720	8,375	28.0
Food	26,085	22,373	16.6
Beer	3,534	3,342	5.7
Financial svcs	460	516	(10.9)

CORPORATE PROFILE

Philip Morris Cos. set a course for international expansion with the appointment of Michael Miles, 51, to succeed Hamish Maxwell as chairman-ceo.

The promotion signals Philip Morris' intent to build its international base through acquisition of food companies. Mr. Miles was chairman-ceo of Kraft General Foods before he took the helm this September.

Philip Morris already is the third-largest food marketer worldwide, with food sales of $26.1 billion, up 16.6%. It has repeatedly said its goal is to become a truly multinational marketer on the scale of Nestle and Unilever, a goal it stepped closer to with the acquisition of Jacobs Suchard in June 1990. Analysts have been closely watching Philip Morris, which will generate $18 billion in cash flow the next five years, for its next acquisition, and most are betting on a company with significant international scope.

Another sweeping change came in October 1990 when Kraft General Foods realigned its agencies, shifting $150 million in billings and eliminating McCann-Erickson Worldwide from its roster. The realignment was designed to fit a new category-based system of agency relationships.

Included in the shifts: The $80 million Maxwell House account returned to Ogilvy & Mather from D'Arcy Masius Benton & Bowles; the $20 million Miracle Whip account, to J. Walter Thompson USA from Foote, Cone & Belding; the $10 million Kraft mayonnaise account, to Leo Burnett USA from Young & Rubicam; the combined $8 million Breakstone, Light n' Lively and Frusen Gladje accounts, to Y&R from McCann; Lender's Bagels to D'Arcy from McCann; and Birds Eye frozen vegetables to Y&R from Wergeles & Drazen. Media buying assignments didn't change.

At the same time, Kraft General Foods standardized its agency compensation system. Under the three-tier program, Kraft General Foods pays a 16% commission rate for superior work in meeting brand objectives; 14% for satisfactory work and 13% for unsatisfactory work.

Other longtime agency relationships were severed in 1991 when Philip Morris parted company with Wells Rich Greene BDDP, following yearlong rumors of trouble on the Benson & Hedges account. In April 1991, the $60 million account was moved to Burnett. The brand has been in a prolonged share descent, hitting 3.5% of the total cigarette market in 1990 (from 3.9% in '89) to rank eighth, according to Wheat, First Securities analyst John C. Maxwell Jr.

Burnett also reaped rewards in March when Miller Brewing Co. gave it the ailing $80 million Miller Lite account from Backer Spielvogel Bates Worldwide. Burnett, which already handles the $25 million Miller High Life business, subsequently scrapped the brand's stale "Tastes great, less filling" theme in favor of "It's it. And that's that."

Miller also moved its media planning for Miller Lite, Miller High Life and test product Miller Lite Ultra to Burnett, effective in 1992, while keeping media buying at Backer.

Benson & Hedges notwithstanding, Philip Morris maintained its 41.9% U.S. market share for all cigarettes, according to Mr. Maxwell.

Marlboro was down slightly for the first time since the '70s, to 25.7% of the market from 27.9%. In 1991, Marlboro was the focus of one of Philip Morris' most surprising product initiatives. Philip Morris budgeted $60 million to roll out Marlboro Medium, a line extension slotted between Marlboro Lights and the flagship. Cork-tipped Marlboro Medium has 1 milligram more tar than white-tipped Marlboro Lights, a ploy to attract male low-tar smokers.

Medium is Philip Morris' second major cigarette launch since the October 1990 rollout of Bucks value-price brand, supported with a $19 million fourth-quarter '90 budget. Philip Morris holds a 24.8% share in the value-price category, second to R.J. Reynolds Tobacco Co.'s 31.3%, Mr. Maxwell said.

In September 1990, Philip Morris promoted William Campbell to president-ceo of the domestic tobacco unit, Philip Morris USA, from senior VP-corporate planning. He succeeded Ehud Houminer, who became senior VP, Philip Morris Management Corp.

Miller's most significant new-product launch in 1991 was Lite Ultra, a 77-calorie beer testing in Arizona, Louisville, San Diego and Madison, Wis.

The Lite agency switch and line extension are aimed at hiking volume of Miller Lite, the No. 2 beer overall with a 10.6% share. Lite isn't growing as fast as rivals. It rose less than 2% in barrels in 1990, compared with 9.3% growth by Bud Light and 12.5% growth by Coors Light. Bud Light ranks fourth overall at 6% and Coors Light No. 3 at 6.1%, according to *Beer Marketers Insights*. Lite's 19.9 million bbls represented 46% of the company's total output.

Backer continues to handle Genuine Draft, ranked ninth with a 3% share. It is the country's fastest-growing beer with shipments up 25.5%.

Kraft General Foods' new product philosophy was best summed up as fat-free. Fat-free items in more than eight categories rang up $350 million in sales in 1990.

New offerings: Kraft Free Singles, Seven Seas Free salad dressing, Kraft Free mayonnaise and Miracle Whip Free spoonable dressing, the latter two the first fat-free products in their category. Philip Morris is No. 2 in the $878 million mayonnaise and spoonable dressing category, with a 46% share.

In June 1991, the company voluntarily removed percentage fat-free labels from its products in anticipation of industry-wide scrutiny by the FDA.

Kraft General Foods has been casting

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NETWORK RADIO
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about for an appropriate umbrella brand name for its healthy food lines. In February 1991, the company began testing a six-item line of "foods for healthier eating" dubbed Kraft Alternatives, but may rename the line Eating Right. The new line, which has done well in test market, will face off against No. 2 ConAgra's highly successful Healthy Choice. Chris Evert is spokeswoman for Eating Right entrees, frozen dessert and pizza.

Under the Budget Gourmet name, Kraft General Foods began testing a 12-item frozen meal (with insulated lunch bag), called Hot Lunch. Kraft General Foods is said to be expanding its Budget Gourmet Light & Healthy with Hearty & Healthy, which provides 2 ounces more than the 10 delivered by Budget Gourmet.

General Foods USA's Post cereals, remained third in the category, but gained share for the first time in a decade from 10.5% to 11.3%, aided by heavier ad spending—$111 million, up 8.8%—and campaigns stressing added value for Grape-Nuts and Post Raisin Bran.

HEADQUARTERS

Philip Morris Cos./120 Park Ave./New York, N.Y. 10017/Phone: (212) 880-5000.

PERSONNEL, BRANDS, AGENCIES

PHILIP MORRIS USA: David E.R. Dangoor, sr vp-mktg; Ellen Merlo, vp-mktg; David Beran, vp-mktg research/planning; Nancy Brennan Lund, grp dir-Marlboro, Robert L. Mikaulay, grp dir-discount brands; Stephen K. Piskor, dir-strategic planning/budget control, Marlboro; Arthur J. Raporte, Jr. brand mgr-Marlboro promos; James A. Taylor, brand mgr-Marlboro; Michael Mahan, dir-strategic planning/budget control, discount brands; Alex O. Aliksanyan, brand mgr-Bristol; Stephen Vasquez, brand mgr-Cambridge; Thomas M. Gargulio, assoc brand mgr-Bucks; Julie A. Greene, assoc brand mgr-Alpine; Arthur J. Goldfarb, dir-strategic planning/budget control, premium brands; Carl L. Cohen, brand mgr-Virginia Slims; Peter G. Henriques, brand mgr-Benson & Hedges/Next; Susan L. Jannetta, brand mgr-Merit; Nancy J. Parmet, assoc brand mgr-Parliament; Michael Heinrich, dir-purchasing; Leo McCullagh, dir-event mktg/consumer promos; Marla Antonoff, mgr-consumer promos/incentive devel; Ina Broeman, mgr-Virginia Slims/discount brand events; Edna Moore, mgr-Benson & Hedges/community mktg events; James Spector, dir-data base mktg; Marianne Nawrocki, mgr-direct mktg; Richard Stirlen, dir-media/POS devel; Phyllis Kornbluth, mgr-POS devel; Roy Anise, dir-mkt research; Louis Suwarna, dir-mktg research/new prods-mktg planning; Karen E. Altenberg, assoc brand mgr-new prods/Cartier.

Cartier, Bristol, Parliament, new products: Backer Spielvogel Bates Worldwide, New York. Ron Kraut, sr vp.

Alpine, Benson & Hedges, Bucks, Cambridge, Marlboro, Merit, Virginia Slims, new products: Leo Burnett USA, Chicago. Peter Volz, exec vp.

KRAFT GENERAL FOODS NORTH AMERICA: Eric Strobel, sr vp-corp mktg.

KRAFT GENERAL FOODS FROZEN PRODS. (Kraft Gen'l. Foods N. Amer.): Larry Benjamin, vp-frozen prods mktg/strategy; Leigh Warner, dir-frozen prods strategy; Julie Zaideman, dir-frozen prods mktg info; Neil Culbertson, vp-mktg, All American Gourmet; Steve O'Hara, vp-strategy, All American Gourmet; Len Lyberger, dir-Kraft, All American Gourmet; Bill Crosson, dir-Birds Eye, All American Gourmet; Bob Ethen, dir-Zappetites, All American Gourmet; Tim Kreger, vp-mktg, dairy div; Bob Creighton, vp-strategic planning/bus devel, dairy div; Ann Buivid, dir-cottage cheese/sour cream/Allied Brands, dairy div; Shelia Terry, dir-mktg info, dairy div; Julie Bowen, dir-frozen desserts, dairy div; Laura McCorvie, dir-frozen snacks, dairy div; Karen King, dir-new prod devel, dairy div; Mike Bailey, vp-gm, Knudsen; Lisa Abbott, dir-mktg, Knudsen; Mariann Emswiler, vp-mktg, Lender's Bagel Bakery; Rick Nienast, dir-strategy, Lender's Bagel Bakery; Jim Dwyer, vp-mktg, Tombstone Pizza; Kevin Scott, dir-strategy, Tombstone.

Breakstone, Breyer's Ice Cream, Breyer's Yogurt, Frozen Gladje, Jell-O, Light 'n Lively: Young & Rubicam, New York. Susan Gianinno, grp dir.

All American Gourmet, Tombstone Pizza: Foote, Cone & Belding Communications, Chicago. Joan Black, sr vp-grp acct dir.

Birds Eye, Budget Gourmet: Wergeles & Drazen, New York. Don Wergeles, chmn.

Cool Whip, Lender's Bagels, Seafood: D'Arcy Masius Benton & Bowles, New York. Peter Rosow, mgmt rep.

Knudsen Dairy Products: Grey Advertising, Los Angeles. Melissa Hochschild, vp-mgmt super.

KRAFT USA (Kraft Gen'l. Foods N. Amer.): Mark Leckie, Betsy Holden, vps-mktg, grocery prods; Roger Deromedi, Sandy Posa, vps-mktg, retail cheese; David Johnson, dir-mktg, specialty prods.

Kraft BBQ Sauce; Bull's-Eye BBQ sauce, Kraft Caramels, Grated Parmesan, Handi-Snacks, Kraft Frozen Entrees, Kraft Macaroni & Cheese/Cheese Deluxe, Kraft Side Dishes, Kraft Thick 'n Spicy, Touch of Butter spread, Velveeta Shells & Cheese: Foote, Cone & Belding, Chicago. Joan Black, sr vp-grp acct dir.

Knudsen Cheese, Knudsen Dairy Products: Grey Advertising, Los Angeles. Melissa Hochschild, vp-mgmt super.

Cheese Whiz, [illegible], Deluxe Slices, Kraft Singles, Miracle Whip, Philadelphia Cream Cheese, Polly-O Cheese: J. Walter Thompson USA, Chicago. Ray Marione, sr vp-mgmt dir.

Cracker Barrel, Di Giorno Fresh, Kraft Natural Cheese, Kraft Salad Dressing, Kraft Free salad dressing, Kraft Light Naturals, Kraft Parkay, Kraft Real Mayonnaise, Seven Seas salad dressing, Spreadery, Velveeta: Leo Burnett USA, Chicago. Dan Reid, exec vp.

OSCAR MAYER FOODS (Kraft Gen'l. Foods N. Amer.): Rick Searer, vp-gm, Oscar Mayer; Bryan Stockton, vp-gm, Louis Rich & subsidiaries; Bob Drane, vp-strategic planning/new prods; Peter Dunn, mktg mgr; Steve Shanesy, mktg mgr-Louis Rich.

Claussen pickles, Oscar Mayer meats, Lunchables: J. Walter Thompson USA, Chicago. Kathy Valdiserri, vp-acct dir.

Louis Kemp Seafood: D'Arcy Masius Benton & Bowles, Chicago. Ben Bishop, sr vp-grp acct dir.

Louis Rich meats, Lunchbreaks: D'Arcy Masius Benton & Bowles, New York. William Perkins, grp acct dir.

GENERAL FOODS USA (Kraft Gen'l. Foods N. Amer.): Loraine Scarpa, vp-mktg svcs; Richard Helstein, vp-adv/mktg svcs; Tom Wrubel, controller/mktg & svcs; J. Mark Haran, vp-mktg/sales; Jim Craigie, Ann Marks, mktg dirs-coffee; Eva Page, vp-mktg, Entenmann's; Steve Mitz, mktg dir-beverages; Dana Gioia, vp-mktg, desserts; Nancy Wong, dir-established brands; Ann Daw, dir-new bus; Gary Rawlings, dir-mktg svcs; Paul Singer, dir-mktg, Post cereals; Rob Lowe, dir-devel, Post cereals.

Freihofer's: Beckman Associates, Albany, N.Y. Leslie Baker, vp.

[illegible], Crystal Light, Entenmann's, Good Seasons, [illegible]: D'Arcy Masius Benton & Bowles, New York. Peter Rosow, Richard Levenson, joint mg dirs.

Bakers chocolate, Certo, Dream Whip, Fruit & Fibre cereal, Grape-Nuts, Honeycomb, Kraft Microwave Entrees, Kool-Aid, Minute Rice, Post Bran Flakes, Post Honey Bunches of Oats, Post Oat Flakes, Post Raisin Bran, Post Toasties, Sure-Jell, Stove Top: Grey Advertising, New York. Jack Frantz, exec vp.

Alpha Bits, Brim coffee, Country Time, Log Cabin, Maxwell House, Pebbles, Shake 'n Bake, Super Golden Crisp, Tang, Yuban: Ogilvy & Mather, New York. Jack Red, sr vp-exec grp dir.

General Foods Intl. Coffees, Jell-O, Sanka: Young & Rubicam, New York. Susan Gianinno, grp dir.

KRAFT GENERAL FOODS COMMERCIAL PRODS.-KRAFT FOODSERVICE INC. (Kraft Gen'l. Foods N. Amer.): Gary Karp, vp-Kraft branded prod sales/mktg; Rick Wallace, dir-mktg, Kraft branded prods; Patsy J. Mellott, dir-trade mktg/comms.

Kraft Foodservice Inc.: Ketchum Advertising, Chicago. Andrea Mallen, vp-acct svcs.

KRAFT GENERAL FOODS COMMERCIAL PRODS.-KRAFT FOOD INGREDIENTS (Kraft Gen'l. Foods N. Amer.): Terry Reagan, dir-mktg, foodservice; Max Maxwell, mktg mgr-foodservice; David Compton, mktg mgr-new prods; Russ Williams, mktg mgr-flavor ingredients; Paul Kenny, dir-confection prods; Bob Milewski, dir-refrigerated prods; Steve Robinson, dir-mktg, retail; Rhonda P. Saslawsky, corp mktg mgr.

Kraft Food Ingredients Grp.: Archer/Malmo, Memphis. Bob O'Conner, acct dir.

California Vegetable Concentrates: Boling & Associates, Fresno, Calif. Jan Boling, acct dir.

MILLER BREWING CO.: Richard Strup, vp-brand promos; Mary Seggerman, premium category dir; Tony Sciolla, brand mgr-Miller Genuine Draft; Steve Wnuk, Mark Wildman, Mark Ziskind, assoc brand mgrs-Miller Genuine Draft; Kevin Tripp, brand mgr-Miller Genuine Draft Light; Laurie Panosh, Rich Reider, asst brand mgrs-Miller Genuine Draft Light; David Rosenberg, brand mgr-Miller High Life; Todd Brachman, asst brand mgr-Miller High Life; Paul Basquin, low calorie category dir; Rob Olejniczak, brand mgr-Lite; John Beck, Thom Zak, asst brand mgrs-Lite; Ann Janikowsky, brand mgr-Lite regional; Jose Milan, Boris Oglesby, assoc brand mgrs-Lite; Tom Cardella, category dir-Allied Brands; Rick Burton, brand mgr-Lowenbrau/Sharps; Alice Frazier, assoc brand mgr-Sharps; Rod Northern, asst brand mgr-Lowenbrau; Chad Vincent, brand mgr-Allied/Leinenkugel's; Jeff Kellar, asst brand mgr, Allied/Leinenkugel's; Neeraj Bharadwaj, asst brand mgr-Allied Brands; Chuck Strehl, natl sales mgr; Jeff Rea, new bus devel category dir; Jim Harris, Jay Lenstrom, brand mgrs-new prods; Alan Smith, asst brand mgr-new prods; Miguel Farah, Jennifer Achuck, Sharon Ali, priority mkts mgrs; Robert Ward, dir-adv svcs; David Dutton, Robin Peterson, media mgrs; Mary Genske, Pat Taflinger, assoc media mgrs.

Magnum, Meister Brau, Miller High Life, Miller Lite, Milwaukee's Best: Leo Burnett USA, Chicago. John Miller, exec vp.

Genuine Draft, Genuine Draft Light: Backer Spielvogel Bates Worldwide, New York. Frank Assumma, exec vp.

Hispanic mktg: Casanova Pendrill Publicidad, Irvine, Calif. Randy Ransome, acct dir.

Lowenbrau: J. Walter Thompson USA, Chicago. Bob Hall, sr vp-mg dir.

Leinenkugel's, Sharp's, Responsible drinking campaign: Frankenberry, Laughlin & Constable, Milwaukee. Steve Laughlin, partner.

Black Consumer mktg: The Mingo Group, New York. Sam Chisholm, pres.

RANK: 60

Philips NV

Eindhoven, Netherlands

Ad spending: $177.7 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	20,432	18,289	11.7
Sunday magazine	513	1,539	(66.7)
Newspaper	108	984	(89.0)
Outdoor	24	13	75.4
Network TV	62,789	60,211	4.3
Spot TV	302	3,308	(90.9)
Syndicated TV	2,865	529	442.0
Cable TV networks	2,047	1,541	32.9
Network radio	11	2,038	(99.5)
Spot radio	19	385	(95.0)
Measured media	89,109	88,836	0.3
Unmeasured	88,600	88,300	0.3
Total	177,709	177,136	0.3
By top brands	**1990**	**1989**	**% chg**
Norelco shavers	50,213	33,244	51.0
Magnavox video equipment	21,880	22,802	(4.0)
Norelco appliances	5,340	6,159	(13.3)
Philips light bulbs	5,099	8,976	(43.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	32,996	29,960	10.1
Earnings	(2,509)	719	NA
U.S.	**1990**	**1989**	**% chg**
Sales	6,119	6,188	(1.1)
Net income	(646)	(191)	NA
Division sales	**1990**	**1989**	**% chg**
Lighting	4,157	3,938	5.6
Consumer electronics	15,029	12,313	22.1
Professional prods	7,727	8,247	(6.3)
Components	4,829	4,436	8.9
Miscellaneous	1,253	1,027	22.1

CORPORATE PROFILE

NV Philips financial woes—which led to a billion-dollar charge-off, major worldwide layoffs and eventually the parent's decision to sell off its mainframe computer business among others—have pushed the company more strongly into its consumer lines.

U.S. activities, operating under North American Philips Corp. and the 80%-owned Polygram, have been beneficiaries of the renewed attention. Philips last September sold Genie Manufacturing, maker of garage door openers and vacuums.

North American Philips now includes Philips Consumer Electronics, maker of

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Magnavox, Philco, Philips and Sylvania products; Norelco Consumer Electronics, maker of Norelco and Schick electric shavers, Clean Air Machines and irons; Philips Lighting; and Philips Interactive Media of America.

Philips Consumer Electronics is the largest advertiser of TVs in the U.S. Magnavox, which switched from the Smothers brothers as ad presenters to John Cleese this year, is the No. 3 TV brand with an 8% share. Its other lines bring Philips' share up to 11.9%, according to *Television Digest*.

Magnavox is No. 5 in VCRs with a 7% share (Sylvania has 1%), and No. 7 in camcorders with a 6.7% share. Philips provides no media support for VCRs and little for camcorders.

With heavy price discounting on TVs, Philips like other consumer electronics marketers has turned to more profitable, often upscale items.

The latest item for Philips, whose parent developed the compact disc, is the compact disc-interactive—a compact disc with video that offers viewer interaction. Philips launches its CD-I in October under the Philips name. A separate worldwide subsidiary—Philips Electronic Media (whose U.S. unit is Philips Interactive Media of America)—has been formed to market software for the compact disc-interactive unit.

The company is expected to spend heavily in the launch next year of a digital compact cassette format for audio. The product allows current audiocassettes to be played by machines that can also record digitally. Tandy Corp. is joining in the rollout.

The big event for the Norelco division was the introduction late last year of a new line of electric razors, which Norelco claims helped hike its share of the men's shaver market to 56%, up from 51%. The company backed all men's shavers with $46.9 million, up 56.3%.

Norelco has access to a long list of Philips European products and is believed to be considering introducing several new lines. Norelco also dropped out of the coffee maker field.

Philips Lighting, faced with continuing price erosion in the basic bulb business, moved last year to a new-product orientation. It has a declining 9% of the consumer bulb business dominated by GE Lighting's 44%.

Polygram's U.S. division integrated A&M Records and Island Records (which it bought earlier) into its distribution system. Polygram's share of records on *Billboard's* charts in 1990 rose to 6.8% from 6.5%.

HEADQUARTERS

Philips N.V. Gloeilampenfabrieken/5621 BA Eindhoven/Netherlands.

North American Philips Corp./100 E. 42nd St./New York, N.Y. 10017/Phone: (212) 850-5000.

PERSONNEL, BRANDS, AGENCIES

PHILIPS CONSUMER ELECTRONICS: James Newbrough, sr vp-mktg; Jerry Calabrese, vp-mktg, personal info prods; Mike Keel, dir-adv.

Magnavox, Philips, Sylvania, Philco: Backer Spielvogel Bates Worldwide, New York. Ed Keating, exec vp-acct mgmt.

NORELCO CONSUMER PRODUCTS: John Beggs, pres; Leigh Alexander, sr mktg mgr-razors; Ed Crawford, sr mktg mgr-home comfort grp.

Norelco, Philips: D'Arcy Masius Benton & Bowles, New York. Ira Schwartz, sr vp-grp dir.

PHILIPS INTERACTIVE MEDIA OF AMERICA: Richard Arroyo, sr vp-mktg.

Philips CD-I Software: Backer Spielvogel Bates Worldwide, New York. Ed Keating, exec vp-acct mgmt.

POLYGRAM RECORDS CORP.: Dane Benable, vp-prod devel, Mercury Records; Dan Brotman, mgr-adv, Polygram Classics & Jazz; Susie Penley, mgr-adv, Polygram Classics & Jazz-Verve/ECM; Steve Miller, natl dir-sales/mktg, Mercury Nashville; Gary Rockhold, executor, Polygram Label Grp.; Matthew Stringer, vp-mktg, Island Records; Jim Guerinot, vp-artist devel/mktg, A&M Records; Emily Winthrop, natl adv mgr-A&M Records.

Mercury Records: Mercury, Atlanta Artists, Big Life, Fontana, Jambco, PWL, rooArt, Wing. Polygram Classics & Jazz: Verve, Deutsche Grammophon, ECM, London, Philips. Mercury Nashville. Polygram Label Group: FFRR, Go Discs, London, Polydor, Smash, Vertigo. Island Records. A&M Records: Delos, Denon, Elephant, Horizon, Perspective, Tabu: Phonad, New York (in-house). Sylvia Chandler, mgr-merch; Leslie Borrok, mgr-adv.

PHILIPS LIGHTING CO.: John Stasiw, vp-gm, consumer div; Kerry Vachon, mkt mgr-incandescent; Gregg DeSilvio, mktg mgr-specialty; DeVerges Jones, dir-mktg svcs; Maureen Carpenter, mgr-mktg comms.

Philips lighting: Cliff Freeman & Partners, New York. Arthur Bijur, exec vp.

Media buying: Saatchi & Saatchi, New York. Joe McCarthy, sr vp-mgmt dir.

RANK: 1

Procter & Gamble Co.

Cincinnati

Ad spending: **$2,284.5 million**

U.S. AD SPENDING ($ in thousands)

By media	**1990**	**1989**	**% chg**
Magazine	155,751	129,660	20.1
Sunday magazine	6,260	7,541	(17.0)
Newspaper	6,418	5,024	27.8
Outdoor	523	487	7.5
Network TV	559,894	449,509	24.6
Spot TV	304,456	217,779	39.8
Syndicated TV	119,258	90,927	31.2
Cable TV networks	57,936	38,861	49.1
Network radio	20,205	24,217	(16.6)
Spot radio	9,305	14,281	(34.8)
Measured media	1,240,007	978,286	26.8
Unmeasured	1,044,500	824,000	26.8
Total	2,284,507	1,802,286	26.8
By top brands	**1990**	**1989**	**% chg**
Folgers coffees	96,866	92,247	5.0
Tide laundry products	62,009	52,405	18.3
Crest toothpaste	43,810	40,909	7.1
Head & Shoulders shampoos	35,915	27,697	29.7
Oil of Olay creams & lotions	34,485	44,709	(22.9)
Cheer laundry detergent	31,410	16,247	93.3
Downy fabric softener	30,777	21,206	45.1
Luvs diapers	30,715	21,028	46.1
Nyquil cold products	29,528	27,405	7.7
Cover Girl facial make-up	29,1[illegible]	13,722	112.7

SALES & EARNINGS ($ in millions)

Worldwide	**1990**	**1989**	**% chg**
Sales	27,026	24,081	12.2
Earnings	1,773	1,602	10.7
U.S.	**1990**	**1989**	**% chg**
Sales	15,276	14,962	2.1
Net earnings	1,360	1,304	4.3
Division sales	**1990**	**1989**	**% chg**
Laundry & cleaning	9,002	7,942	13.3
Personal care	13,468	11,767	14.5
Food & beverage	3,546	3,318	6.9
Pulp & chemicals	1,709	1,666	2.6

CORPORATE PROFILE

Procter & Gamble Co. continues to expand its presence in the international marketplace while relying on new-product initiatives to boost its U.S. business.

Under the leadership of Chairman-CEO Edwin L. Artzt, P&G intends to become a significant competitor in the $16 billion worldwide cosmetics and fragrances market after spending $1.14 billion to acquire Max Factor and Betrix lines from Revlon in July '91.

Already P&G is the top mass-marketer of cosmetics in the U.S. thanks to its $1.3 billion purchase of Noxell Corp. in 1989.

In February, P&G agreed to sell its Santa Fe brand of men's fragrances and toiletries to DuCair Tsumura, the U.S. subsidiary of Tokyo-based Tsumura & Co. The company also sold Dramamine to Upjohn Co. and Icy Hot to Chattem for a combined $45 million.

Speculation that P&G would sell all or parts of its food and beverage division reached its highest level when Exec VP B. Jurgen Hintz resigned in June. The company realigned its U.S. business under Exec VP Durk Jager. The company denied plans to sell any of its $3.2 billion food and beverage business "now or in the foreseeable future."

P&G is moving ahead with new food and beverage products including the testing of a healthier version of Crisco Oil in the Midwest.

Last year, Crisco had a 19% share in the $795.6 million cooking and salad oil market, according to Information Resources Inc.'s InfoScan. Analysts believe the brand has been hurt by consumers' concern about healthier alternatives.

P&G also is putting the Crisco logo on its Puritan Oil, a 100% canola oil product. That decision prompted the company to consolidate the Puritan ad account with Grey Advertising, Crisco's agency, from N W Ayer.

Duncan Hines' Cups Microwave cupcakes and brownies were expanded to most of the U.S. in 1990; and going into test were Folgers Singles, a coffee bag for single servings, and Speas Farm Parents Choice calcium-fortified apple juice.

P&G is reaping the gains of its expansion of superconcentrated detergents—sold in about 70% of the U.S. The company offers "Ultra" versions for all of its laundry detergents—Tide, Gain, Oxydol, Bold and Cheer.

The overwhelming laundry detergent leader, P&G boosted its total share of the category to 54.5% in the summer of 1991 from a 53.5% share in the prior summer, according to Kidder, Peabody & Co. Other household product roll-outs include the national expansion of Liquid Tide with Bleach Alternative; Cinch, a combination glass/all-purpose cleaner; and Cascade LiquiGel automatic dishwashing detergent.

To further invigorate its household products business, P&G is testing the restaging of Ivory Liquid. Ultra Downy fabric softener also is in test.

P&G is readying a major advertising campaign for the fall national launch of Pampers Phases and Luvs Phases in the $4 billion disposable diaper category. Each brand will feature seven phases with different design and size features keyed to a baby's development.

P&G commands a leading 48.5% of the disposable diaper category from its two brands compared with Kimberly-Clark's 29.5% share, according to Kidder, Peabody.

Head & Shoulders 2-in-1 shampoo will begin national distribution in October without market testing. P&G remains the market leader in the $1.15 billion shampoo category with a combined 39.5% share for all brands in summer 1991 compared with 36.5% a year earlier.

The Crest brand name is being extended to its first toothbrush in the U.S. called Crest Complete. The product began tests in late summer. Crest Neat Squeeze began national roll-out in the spring. The product offers new packaging—a squeezable soft pump—for "less mess." Earlier in the year the FDA halted the rollout of Ultra Protection Crest because its anti-microbial cavity fighting ingredient, triclosan, had not undergone a new drug application process. The introduction could be delayed as much as three years.

P&G encountered more trouble with the FDA in the spring over the labeling of Citrus Hill Fresh Choice orange juice. The FDA contended the word "fresh" wasn't appropriate for a juice made from concentrate. After the FDA seized product from a Minneapolis warehouse, P&G agreed to change the label to just Citrus Hill.

Another FDA flap arose over "No cholesterol" labeling of cooking oils. Procter & Gamble agreed to voluntarily drop the claim from all of its products, including Crisco.

HEADQUARTERS

Procter & Gamble Co./P. O. Box 599/Cincinnati, Ohio 45201/Phone: (513) 983-1100.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Edwin L. Artzt, chmn; John E. Pepper, pres; Gerald V. Dirvin, Durk I. Jager, exec vps; Gordon F. Brunner, sr vp research/devel; Robert J. Herbold, sr vp-info svcs/adv; Lawrence D. Milligan, sr vp-sales; Michael J. Allen, Wolfgang C. Berndt, Robert T. Blanchard, Bruce L. Byrnes, Larry G. Dare, Stephen P. Donovan Jr., Harald Einsmann, Malcolm Jozoff, Jorge P. Montoya, Richard R. Nicolosi, Wahib N. Zaki, grp vps; Donald W. Campbell, vp-foodservvice/lodging prods; G. Gilbert Cloyd, vp-pharmaceuticals; Todd A. Garrett, vp-beauty care prods; Alan G. Lafley, vp-laundry/cleaning prods; Thomas A. Moore, vp-healthcare prods; John A. Saxton, vp-cosmetics/fragrances; Frank P. Smith, vp-chemicals; Mark Upson III, vp-food/beverage prods; Walker J. Wallace, vp-Olestra; Mark A. Collar, vp-gm, deodorants/Old Spice; R. Kerry Clark, vp-gm, laundry prods; Peter Elsing, vp-gm, oral care prods; Robert E. Gill, vp-gm, snacks; Jeffrey D. Jones, vp-gm, diapers; Mark S. Levy, vp-gm, fabric conditioners; John N. Lilly, vp-gm, juice prods; Robert M. Malcolm, vp-gm, personal cleansing prods; Peter L. Wilson, vp-gm, respiratory care prods.

Bold, Crest Complete, Cheer, Era Plus, Gleem, Lava liquid & bar soaps, Luvs disposable diapers, Secret, Pert Plus, White Cloud, Pepto-Bismol, Prell, Clarion cosmetics, Noxzema: Leo Burnett USA, Chicago. Mary Bishop, exec vp-acct dir.

Black adv: Crest, Crisco shortening, Tide: Burrell Advertising, Chicago. Fay Ferguson, vp-acct dir.

Bounce, Dash, Dawn, Ivory Snow, Crest, Fasteeth, Fixodent, Vicks Formula 44, NyQuil, Percogesic, Vicks VapoRub, Scope, Sinex, Clearasil, Always, Attends, Charmin, Pampers, Ivory Shampoo, Wondra: D'Arcy Masius Benton & Bowles, New York.

Navy by Cover Girl, Max Factor cosmetics, California for Women/Men fragrances, Le Jardin fragrance, new products: Lotas Minard Patton McIver, New York. Sally Minard.

Professional adv: Attends, Charmin Care, Crest, Head & Shoulders, Pepto-Bismol, Puffs, Scope, Norwich International: Medicus Intercon International, New York.

Cover Girl Cosmetics, Downy fabric softener-liquid & dryer sheets, Joy, Crisco shortening and Crisco cooking oil, Puritan Oil, Jif, Lestoil cleaner, Pantene hair-care line, Sure: Grey Advertising, New York. Neil Kreisberg, exec vp.

Professional adv: Crisco oil, Citrus Hill Plus Calcium, Folgers decaf, Speas Farm juices, Bain de Soleil, Oil of Olay, Ivory bar soap and liquid, Safeguard: Gross Townsend Frank Hoffman, New York.

Sunny Delight: Gumpertz/Bentley/Fried, Los Angeles. Richard Fried, pres-mgmt super.

Bounty, Cinch, Fisher Nut, Safeguard, Top Job, Zest: Jordan, McGrath, Case & Taylor, New York. Alice Bond, exec vp.

Foodservice cleaning products, coin vending cleaning products: Ketchum Advertising, Chicago. Lee Lippman, pres.

Professional adv: Asacol and Dantrium: Klemtner Advertising, New York.

Children's NyQuil, Chloraseptic, Pediatric Formula 44, Peridex, [illegible]: Lally, McFarland & Pantello, New York. Laura Krein, Joni Honig, vp-mgmt supers.

Folgers regular and decaffeinated coffee, Puffs, Citrus Hill juices, Certain, Duncan Hines Baking Mix line, Hawaiian Punch, Bain de Soleil suncare line: N W

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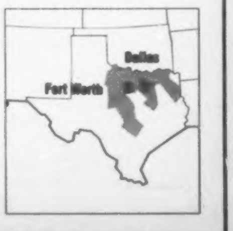

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Ayer, New York. Warren E. Albright, exec vp.

Foodservice & lodging products, shortening & oils, coffee, bar soap & amenities, institutional Atlantic: Northlich Stolley LaWarre, Cincinnati. Steve Rost, sr vp-dir client svcs.

Tide detergents, Cascade, Camay, Comet, Dreft, Ivory bar soap & liquid, Crystal, Solo, Spic & Span, industrial, chemical grocery trade, drug trade & military adv: Saatchi & Saatchi Advertising, New York. Paula Forman, exec vp-exec mgmt dir.

Biz, Chloraseptic, Mr. Clean, Coast, Comet liquid bleach, Head & Shoulders, Metamucil, Vicks Throat Drops, Old Spice, Vidal Sassoon haircare line: Tatham/RSCG, Chicago. Robert Hielscher, sr partner-client svcs dir.

Gain, Oil of Olay and Olay Bath Bar, Pringle's, Duncan Hines cookies: Wells Rich Greene BDDP, New York. Dick Byrne, exec vp-co dir acct svcs; Chris Hansen, exec vp-dir acct svcs.

RANK: 34

Quaker Oats Co.

Chicago

Ad spending: **$329.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	31,347	23,409	33.9
Sunday magazine	107	1,312	(91.8)
Newspaper	1,556	1,449	7.4
Outdoor	486	64	658.7
Network TV	73,732	104,415	(29.4)
Spot TV	35,839	21,837	64.1
Syndicated TV	11,941	17,536	(31.9)
Cable TV networks	3,294	4,326	(23.9)
Network radio	3,418	1,856	84.2
Spot radio	3,291	3,101	6.1
Measured media	165,010	179,304	(8.0)
Unmeasured	164,300	178,500	(8.0)
Total	329,310	357,804	(8.0)
By top brands	**1990**	**1989**	**% chg**
Quaker cereal	49,346	58,694	(15.9)
Gatorade drinks	25,542	20,433	25.0
Fisher-Price toys	20,723	33,008	(37.2)
Cap'n Crunch cereal	11,260	8,130	38.5
Ken-L Ration dog food	10,194	10,583	(3.7)
Life cereal	9,792	8,578	14.1
Aunt Jemima syrups	7,327	5,379	36.2

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	5,491	5,031	9.2
Earnings	206	169	21.9
U.S.	**1990**	**1989**	**% chg**
Sales	3,860	3,610	6.9
Operating income	429	373	15.2

CORPORATE PROFILE

Quaker Oats Co. may never rename itself Gatorade Inc., but the sports drink has become the company's top priority and star performer worldwide.

Quaker piggybacked on strong Gatorade sales to report fiscal 1991 results substantially improved over its disastrous fiscal 1990. Quaker's companywide 9% sales increase was backed by a 5% increase in unit volumes —and that was driven largely by a 15% hike in Gatorade volume domestically and international expansion of the sports drink franchise. Fiscal 1991 ended June 30.

Gatorade is now a $600 million business in the U.S. and is expected to be $1 billion by the year 2000. Overseas sales are about $150 million and growing with more new market introductions in Europe, Latin America and Asia. Although Gatorade has more than 90% of the U.S. sports drink business, it's constantly challenged by regional competitors and soft-drink companies Coca-Cola Co., Pepsi Cola Co. and Dr Pepper Co., all of which are testing challengers.

Quaker has launched a host of flavor and packaging variations—gallon bottles, single-serve cans, a Gatorade Light, aseptic boxes—and has added availability through convenience stores and a Gatorade fountain system now in 10,000 U.S. locations.

To give the brand added punch, Quaker signed Chicago Bulls superstar Michael Jordan to a reported 10 year, $18 million contract. A U.S. campaign, themed "Be like Mike," broke last month. Mr. Jordan also will be used in international markets.

During calendar 1990 Quaker's measured media spending fell for the second consecutive year—down 8%—as the company continued to restrict ad spending to a few key products in most of its foods businesses.

In the $7.2 billion ready-to-eat cereal market, Quaker is focusing marketing attention on four "core" brands: Cap'n Crunch, Life, Quaker 100% Natural and Quaker Oat Squares. Spending on the four rose 6% to $35 million.

The company's pound share fell from 8.1% in 1988 to 7.4% in calendar 1990, placing it fourth in the category.

Similarly, Quaker has focused nearly all its marketing attention in the $7 billion pet food industry on two brands: Kibbles'n Bits'n Bits'n Bits dog food, which will get a "lean" extension later this year, and Cycle dog foods, relaunched this year backed by $37 million. The "advanced formula" Cycle shares shelf space with Ralston Purina Co.'s expanded O.N.E. line and Kal Kan Foods' new Expert brand—all targeted at the growing pet food business outside supermarkets.

Once second to Purina, Quaker has dropped to fifth in the $5.7 billion supermarket pet food category, with a 10.1% share—though the company said pet food volumes increased 3% in fiscal 1991.

Bayer Bess Vanderwarker handled the Cycle relaunch, winning the account in a creative shoot-out with J. Walter Thompson USA. JWT found itself only a minor Quaker agency after also losing the nearly $5 million granola bar and rice cake account to Berry-Brown.

Although Quaker triumphed when General Mills withdrew from the hot-cereal market last June, leaving Quaker's 60% share intact, the category and the company's own oatmeal sales dropped for the second year in a row. Media spending fell 20% in calendar 1990 to $14.9 million.

Golden Grain posted a good year, leading the rice side-dish category with a 38% share and the noodle side-dish category with 29%. The company launched a microwaveable version of Rice-A-Roni and introduced a shelf-stable Lunch for One meal line.

Quaker last June completed the delayed spinoff of its Fisher-Price toys subsidiary as an independent operating company and so began fiscal 1992 as a food-only marketer.

HEADQUARTERS

Quaker Oats Co./Quaker Tower/321 N. Clark St./Chicago, Ill. 60610/Phone: (312) 222-7111.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: David R. Nogle, sr vp; John Blair, vp-mktg svcs/new ventures; C. Clarkson Hine, vp-adv; Jerry Perkins, dir-sales promo.

Hispanic adv: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

BREAKFAST DIV: Verinder K. Syal, corp sr vp-pres; John Breuer, vp-mktg, ready-to-eat cereals; Lyle Hubbard, vp-mktg, Aunt Jemima syrups/mixes/snacks/corn goods; Keith Robinson, vp-mktg, hot cereals.

Aunt Jemima products, Life, 100% Natural cereal, Quaker Oat Squares, Quaker Oats & Instant Oatmeal: Jordan, McGrath, Case & Taylor, New York. Bruce Guidotti, exec vp-acct grp dir.

Cap'n Crunch, Crunchy Bran, Kretschmer wheat germ, Ohs, Puffed Rice, Puffed Wheat, Quaker Oat Bran, Tiny Toons, new products: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Industrial cereals, health foods: Bender, Browning, Dolby & Sanderson, Chicago. Kathleen Truty, acct super.

African-American consumer mkt adv: Burrell Advertising, Chicago. Charles McClellan, vp-acct dir.

GROCERY SPECIALTIES DIV: Peter J. Vitulli, pres; Bill Schmidt, vp-sports mktg; Peggy Dyer, vp-mktg; Deborah E. Kelly, vp-new beverages.

Gatorade & Gatorade Light: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Granola bars, Quaker corn goods, rice & grain cakes, grits, Van Camp's/Stokely beans, Wolf brand chili: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

FROZEN FOODS DIV: Barbara R. Allen, pres.

Aunt Jemima products: Jordan, McGrath, Case & Taylor, New York. Bruce Guidotti, exec vp-acct grp dir.

Quaker [illegible]: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Celeste pizza: Berry-Brown Advertising, Dallas. Patricia Magel, vp-acct super.

GOLDEN GRAIN: David Bere, pres.

Noodle-Roni, Rice-A-Roni, Lunch for One: Goldberg Moser O'Neill, San Francisco. Gail Piper, mgmt super.

Mission Pasta, Golden Grain: Lewis, Browand & Associates, Oakland, Calif. C. Roger Lewis, pres.

PET FOOD DIV: Douglas W. Mills, sr vp-gm; Mark Shapiro, vp-mktg.

Cycle, Gravy Train: Bayer Bess Vanderwarker, Chicago. R. Brian Goodall, exec vp-dir, acct mgmt.

Kibbles'n Bits'n Bits'n Bits, King Kuts, dog and cat treats: J. Walter Thompson USA, Chicago. John Wells, sr vp.

FOODSERVICE DIV: Walter G. VanBenthuysen, pres; Paul Barron, vp-mktg.

Pritikin: Frank C. Nahser Inc., Chicago. Thomas Perlitz, sr vp.

RANK: 31

Ralston Purina Co.

St. Louis

Ad spending: **$354.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	26,272	34,093	(22.9)
Sunday magazine	3,112	1,407	121.2
Newspaper	1,108	3,163	(65.0)
Outdoor	145	24	515.7
Network TV	48,525	69,068	(29.7)
Spot TV	26,845	25,256	6.3
Syndicated TV	11,805	13,424	(12.1)
Cable TV networks	7,620	4,802	58.7
Network radio	0	1,183	NA
Spot radio	2,168	2,166	0.1
Measured media	127,601	154,585	(17.5)
Unmeasured	226,900	274,900	(17.5)
Total	354,501	429,485	(17.5)
By top brands	**1990**	**1989**	**% chg**
Eveready batteries	29,006	30,427	(4.7)
Purina dog food	24,090	47,177	(48.9)
Hostess cakes & pies	13,805	2,062	569.6
Ralston cereal	11,555	19,011	(39.2)
Beech-nut baby food	8,142	7,782	4.6
Purina cat food	7,136	14,470	(50.7)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	7,101	6,658	6.6
Earnings	396	423	(6.3)
U.S.	**1990**	**1989**	**% chg**
Sales	5,084	4,826	5.3
Operating profit	716	663	8.0
Division sales	**1990**	**1989**	**% chg**
Bakery prods	1,957	1,941	0.8
Pet foods	1,701	1,685	1.0
Cereals	508	414	22.7
Battery products	1,542	1,351	14.1
Agricultural products	907	954	(4.9)
Soy protein products	262	222	18.0
Other	226	93	143.8

CORPORATE PROFILE

Ralston Purina Co. counted on a strong cereal business and improved results for Eveready batteries to offset flat results in pet food, which had a bust year in fiscal 1990.

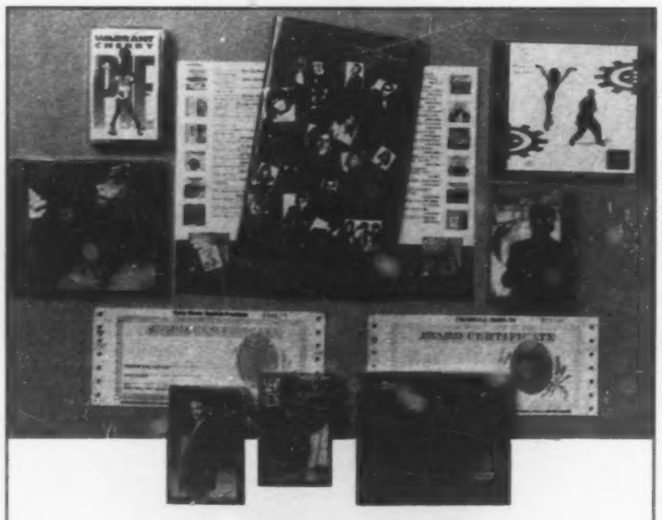
Sales rose just 0.9% as the Purina brands struggled to keep unit volumes up in the face of unremitting price and promotion wars in the $7 billion pet food industry. Purina accounted for 24% of sales but 40% of operating income.

Purina is seeking to capitalize on the trend toward superpremium, "lifestage" products led by Iams Co. and Colgate-Palmolive Co.'s Hill's Pet Products. Purina has developed brands for the growing number of pet owners who shop at non-supermarket outlets—a business now totaling $1 billion-plus in estimated sales.

In the past year, the company expanded the premium-price Purina O.N.E. line to include not only dog food but puppy, light and senior dog foods, as well as cat and kitten formulas. The expansion, supported by a $40 million to $50 million marketing campaign, came as key rivals Kal Kan Foods and Quaker Oats Co. introduced similar premium, lifestage products under the Expert and Cycle banners.

For its mainstream pet food brands, Purina launched an umbrella ad campaign with similar positioning: the four mainline Purina dog foods—Dog Chow, Puppy Chow, Fit & Trim and Hi Pro—meet dogs' differing nutritional needs. Similarly, Purina added to its Cat Chow line with Cat Chow Mature for older cats and Cat Chow Special Care.

Purina also launched Nature's Course, billed as the first dog food made with pesticide-free wheat, and packaged in recycled-paper boxes.



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To Get To New Orleans

You Have To Pass Through Customs

New Orleans is a city steeped in tradition. And for over 150 years, people in New Orleans have customarily begun their mornings with a piping-hot cup of strong coffee and a copy of The Times-Picayune.

And because New Orleanians know that each day is meant to be savored, like a plate of their momma's red beans, this is one tradition not likely to be broken.

The Times-Picayune is as much a part of New Orleans as coffee and beignets. For information about the New Orleans market and The Times-Picayune, contact Robert O'Neill at (504) 826-3070.

The Times-Picayune's Coverage of the New Orleans Market:*

Sunday:
726,000 metropolitan adults - 77%

Daily:
607,000 metropolitan adults - 64%

*Source: Belden CMS, March-December 1990

The Times-Picayune

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Purina leads the $5.7 billion market for supermarket pet foods with an overall 26.4% share but has lost some ground in recent years to aggressive pricing by Kal Kan (now the country's No. 3 pet food marketer, with 12.4% of supermarket sales). No. 2 is Friskies PetCare (14.4%).

In the $7.2 billion ready-to-eat cereal category where Ralston is a small niche player, the company had a banner year, with a dollar sales increase of 22.7%. On top of the company's 1989-90 success in marketing licensed cereals for children—particularly Batman and Teenage Mutant Ninja Turtles—Ralston was the key beneficiary in 1990-91 as economy-minded consumers shifted to lower-price, private-label cereals. Private-label cereals, of which Ralston is the primary producer, increased their category pound share to 6.5%, up from 3.6% in 1987. Ralston's branded products had a 6.1% pound share of the market, up from 5.6% in 1989.

Ralston is being challenged to maintain that momentum; its Jetsons cereal was a flop, and the company has suffered from a dearth of big licensed properties.

Ralston's key non-food business, Eveready Battery Co., spent most of its $30 million in media support behind the bunny campaign. Now approaching its second anniversary, the campaign has helped stabilize Energizer's once-falling share of the $2 billion battery business. In fiscal 1990, Eveready's domestic unit sales total was up 4%, with Energizer posting double-digit gains. Energizer continues to trail Duracell about 36% to 44% in the alkaline segment of the battery business.

Ralston's newest division, Beech-Nut Nutrition Corp., shifted its $8 million baby food account to DDB Needham Worldwide from Sherwood & Schneider, one of Ralston's stable of regular ad agencies. Beech-Nut this past April launched a new ad campaign and began testing an "organic" baby food line, Special Harvest.

Continental Baking Co. struggled in a price war in the $1.1 billion market for package doughnuts, snack cakes and pies. The company's sales were flat, and its supermarket share totaled 26.6%, behind leader McKee Baking Co., marketer of Little Debbie treats. Continental's main product initiative has been launching reduced-fat and -calorie versions of its older products, including "light" Hostess Twinkies and Cupcakes.

HEADQUARTERS

Ralston Purina Co./Checkerboard Square/St. Louis, Mo. 63164/Phone: (314) 982-1000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: T.E. Touhill, vp-dir, adv/creative resources. Centra Advertising Co. (in-house): T.P. Cenova, S.J. McMichael, vps-co-creative dirs; J.K. Lucas, vp-dir, client svcs. Checkmark Promotion & Marketing (in-house): G.C. Cook, pres. Checkerboard Media Co. (in-house): D.R. Martin, pres.

GROCERY PRODUCTS DIV: T.E. Block, vp-dir, dog food mktg; A.R. Bresler, vp-dir, cat food mktg; J.R. von der Heydt, dir-mktg, Chex cereals/specialty foods mktg; D.D. Buck, dir-mktg, children's foods/all family mktg; J.R. Sivewright, bus dir-store brand mktg.

Bran News, Ghostbusters, Hi Pro: Ally & Gargano, New York. Warren Dechter, exec vp.

Addams Family, Almond Delight, Bill & Ted's Excellent Cereal, Bran Chex, Chex, Cookie-Crisp, Cat Chow, Prince of Thieves, Teenage Mutant Ninja Turtles Pizza Crunchabunga, WWF Superstars: Avrett, Free & Ginsberg, New York. John G. Avrett, chmn.

Dog food-Hispanic adv: Castor Advertising Corp., New York. Filberto Fernandez, pres.

Deli Cat, Dog Chow, Mainstay, Pro Plan pet foods, Pro-Visions, Puppy Chow, Keystone Resort: Centra Advertising, St. Louis. J.W. Hickman, vp-acct super.

Kit 'N Kaboodle, Meow Mix: DDB Needham Worldwide, Chicago. Pat Winegar, vp-acct super.

Dog food umbrella campaign, Nature's Course: Fallon McElligott, Minneapolis. Patrick R. Fallon, chmn.

Bonz, Breakfast on the Run, Chuck Wagon, Purina Biscuits: Martin Marshall Jaccoma Mitchell, New York. George Jaccoma, chmn.

Teenage Mutant Ninja Turtles cereal: Noble Tennant Co., Chicago. Timothy Dorgan, pres-ceo.

Grravy, Purina O.N.E.: Scali, McCabe, Sloves, New York. Stuart Epstein, exec vp.

Pets for People: Simmons, Durham & Associates, St. Louis. B.W. Durham, Jr., exec vp-treas.

Pro Plan, breeder enthusiast mktg: Stockton West Burkhart, Cincinnati. Maureen Vogele, sr vp-dir, client svcs.

Beggin' Strips, Chex Snack Mix, Double Chex, Lucky Dog: Tatham/RSCG, Chicago. Thomas Schafer, sr partner-acct mgr.

Veterinary adv: John Volk Co., Chicago. John Volk, pres-acct super.

CONTINENTAL BAKING CO.: J.W. Brown, chmn-ceo; R.W. Bracken, exec vp; J.T. Sweetwood, vp-dir, mktg/bread; R.M. Proctor, vp-dir, mktg/cake.

EVEREADY BATTERY CO.: J.P. Mulcahy, chmn-ceo; G.L. Meffert, exec vp; M.S. Foley, vp-brand mktg/bus devel; R.J. Smith, dir-brand mktg/primary batteries; A.A. Bevilacqua, dir-brand mktg/diversified prods.

Energizer, lighting products: Chiat/Day/Mojo, Venice, Calif. Bob Kuperman, pres-ceo.

Hispanic adv: Casanova Pendrill Publicidad, Irvine, Calif. Paul L. Casanova, pres.

BEECH-NUT NUTRITION CO.: J.A. Nichols, pres; B.L. Korn, grp dir, Beech-Nut.

Beech-Nut: DDB Needham Worldwide, Chicago. Pat Winegar, vp-acct super.

Hispanic adv: Conill Advertising, New York. A. Conill, mgmt super.

RANK: 74

Revlon Group

New York

Ad spending: **$143.6** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	43,248	48,254	(10.4)
Sunday magazine	2,805	3,484	(19.5)
Newspaper	50	307	(83.6)
Outdoor	5	58	(91.2)
Network TV	12,614	15,444	(18.3)
Spot TV	8,496	5,012	69.5
Syndicated TV	2,131	1,718	24.0
Cable TV networks	2,189	2,251	(2.8)
Network radio	0	323	NA
Spot radio	114	9	1,229.7
Measured media	71,653	76,860	(6.8)
Unmeasured	71,900	77,100	(6.7)
Total	143,553	153,960	(6.8)
By top brands	**1990**	**1989**	**% chg**
Revlon shampoos & conditioners	9,515	6,216	53.1
Revlon nailcare products	6,041	6,399	(5.6)
Unforgettable perfume	5,625	0	NA
Revlon facial products	5,170	3,468	49.1

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	3,237	2,942	10.0
Earnings	142	53	168.9
U.S.	**1990**	**1989**	**% chg**
Sales	1,918	1,890	1.5
Operating profit	184	224	(17.9)
Division sales	**1990**	**1989**	**% chg**
Beauty products	2,635	2,446	7.7
Healthcare	502	402	24.8
Flavors	100	94	6.5

CORPORATE PROFILE

After buying Revlon in 1985, Ronald O. Perelman, positioned himself as a marketer as fluent with advertising as the art of the deal. Six years later, the dealmaker still dominates.

Rumors were rife in late 1990 and early this year that Mr. Perelman was considering dismantling his cosmetics empire. By this April, Germaine Monteil and Lancaster had been sold to Joh. A. Benckiser of Germany. Later in the month came an even bigger deal: Procter & Gamble Co. paid $1.06 billion for Revlon's worldwide Max Factor and Betrix lines of cosmetics and fragrances with combined sales of $800 million, 80% of it overseas.

Following the announcement, Revlon President Sol Levine, 63, retired. He was replaced by Jerry Levin, 46, previously exec VP of parent company MacAndrews & Forbes Holdings and best known for his skills in mergers and acquisitions.

Besides reducing its international beauty presence, Revlon lost mass-market share points in the U.S. Its pre-sale level was about 20% of mass-market cosmetics, with 12% to 13% from the basic Revlon brand and 7% from Max Factor and Almay combined.

Revlon, set to launch a Darker Tones of Almay line for ethnic consumers in November, refused comment on rumors of an Almay sale. The company in the meantime announced the sale of another cosmetic line, Clean & Clear, to Johnson & Johnson Consumer Products.

While Mr. Perelman has been adept at raising money, Revlon hasn't won equally high marks in marketing.

Just after restaging Flex in late 1990, the company announced the brand would again be overhauled with a new ad campaign and returned to its basic package design. The turnabout followed declines in market share for shampoo, which at the end of 1990 stood at 2.6%, down from 8% five years earlier. To help boost Flex, Revlon also introduced Flex & Go, a two-in-one shampoo/conditoner. Flex's ad spending rose 1.6% to $6.3 million in 1990.

Revlon's fragrances also have had a bumpy ride, with one of the few exceptions being the Guess department store brand launched in 1990 and extended this year to the men's category.

Revlon also has announced the delay of two fall 1991 fragrance launches, the much heralded Ellen Tracy designer perfume and Fire & Ice. The company blamed technical problems for Tracy's delay and positioning difficulties for Fire & Ice.

Revlon will proceed, however, with the fall introduction of Downtown Girl, a mass-market fragrance. This summer it also introduced Charlie Express, yet another line extension of the aging brand now being squeezed by both Coty's exclamation! and Cover Girl's Navy. Charlie's ad spending fell to $869,000 in 1990 from $2.7 million in 1989.

In skincare, Revlon in 1991 introduced a line called New Age Naturals, but the jury's still out on its success.

HEADQUARTERS

Revlon Inc./625 Madison Ave./New York, N.Y./Phone: (212) 572-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ronald O. Perelman, chmn & ceo; Jerry Levin, pres; Michael Hammond, pres-Revlon North America; Richard Tarlow, pres-Tarlow Advertising (in-house); Arne Zimmerman, pres-Revlon Classic Cosmetics & Fragrance Grp.; Charles Pergola, pres-Revlon Beauty Care; Irving Bottner, pres-Revlon Professional Prods.; Michael Gannaway, pres-strategic planning; Peter Zegras, pres-Fine Fragrance Grp.; Andrea Robinson, pres-Ultima II; Paul Block, exec vp-mktg; Daniel J. Moriarty, sr vp-pr; Annette Golden, exec vp-creative mktg.

Revlon, Almay, Ultima II, Revlon Fine Fragrances, Princess Marcella Borghese, Alexandra de Markoff, Jeanne Gatineau, Visage Beaute, Toiletries: Tarlow Advertising, New York (in-house). Richard Tarlow, pres.

Corporate media buying: Tarlow Advertising, New York (in-house). Anthony Cozzolino, vp-media/budget.

Scoundrel fragrance: Peter Rogers Associates, New York. Linda McGrath, acct super.

RANK: 13

RJR Nabisco

Winston-Salem, N.C.

Ad spending: **$636.1** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	78,800	132,780	(40.7)
Sunday magazine	9,122	3,971	129.7
Newspaper	10,936	6,136	78.2
Outdoor	52,356	49,144	6.5
Network TV	133,555	143,309	(6.8)
Spot TV	17,313	9,260	87.0
Syndicated TV	22,144	13,285	66.7
Cable TV networks	21,667	17,852	21.4
Network radio	1,560	2,584	(39.6)
Spot radio	1,845	4,257	(56.6)
Measured media	349,297	382,577	(8.7)
Unmeasured	286,800	314,100	(8.7)
Total	636,097	696,677	(8.7)
By top brands	**1990**	**1989**	**% chg**
Nabisco cookies & crackers	94,890	69,907	35.7
Camel cigarettes	30,853	27,222	13.3
Salem cigarettes	25,402	29,605	(14.2)
Winston cigarettes	18,729	23,981	(21.9)
Life Savers	15,660	13,998	11.9
Carefree gum	15,118	13,288	13.8
Chex cereals	14,946	11,129	34.3
Fleischmanns margarine & oils	14,150	14,924	(5.2)
Vantage cigarettes	13,833	24,999	(44.7)
Nabisco cereals	12,901	21,573	(40.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	13,879	12,764	8.7
Earnings	(429)	(1,149)	NA
U.S.	**1990**	**1989**	**% chg**
Sales	12,125	10,521	15.2
Operating income	2,696	1,964	37.3
Division sales	**1990**	**1989**	**% chg**
Tobacco	8,053	6,981	15.4
Food	5,826	5,783	0.7

CORPORATE PROFILE

RJR Nabisco, having shed much of its debt in 1990, began stepping up new-product introductions.

In a year in which Nabisco Biscuit increased its leading share of the $7 billion cookie/cracker market to 44% from 43% in 1989, the division built on the success of its line extension strategy, introducing Mini Chips Ahoy!, Sprinkled Chips Ahoy!, Fat Free Premium crackers and Ritz Bits in several flavors. In 1991, it added Mr. Phipps Pretzel Chips, My Goodness! low-fat cookies, Teddy Graham Bearwiches and Mini Oreos.

Nabisco's flagship Oreo, in danger of losing its No. 1 position to No. 2 Chips Ahoy!, got a boost from an "Oreo Twist" ad and promotion campaign. Nabisco put $13.8 million behind the promotion featuring singer Chubby Checker, upping the media ante by 36.6%. Oreo sales rose 8%.

The division's success during 1990 led the company to appoint VP-Marketing Bruce Wood, 40, to the presidency of RJR's ailing Planters LifeSavers division this April. Mr. Wood succeeds Dolph von Arx, 56, who retired.

At the same time, the company merged Planters with Nabisco into RJR Nabisco

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Foods Group.

RJR Nabisco's magazine spending, cut by 48.9%, was a casualty of the tobacco unit's increasing favoring of direct mail and outdoor.

R.J. Reynolds Tobacco Co.'s market share volume improved 1.2 percentage points to 29.7% in 1990 compared with Philip Morris Cos.' leading 41.9% share, flat with 1989, according to Wheat, First Securities analyst John C. Maxwell Jr.

With the exception of Camel, RJR's growth was not in any of its full-margin brands, a lineup that includes Winston, Salem and Vantage. Camel rose to 4.4% of market from 3.9%, according to Mr. Maxwell.

Playing on Camel's momentum, the company this summer began testing Camel 99s, a 100-millimeter version of Camel packed in a hard box.

Salem barely held share in 1990, with 6.2%, flat with a year earlier, Mr. Maxwell said, while Vantage declined to 2.4% from 2.5%. Winston dropped to 8.8% from 9.1%.

RJR remained the leader in value-price cigarettes in 1990 with a 31.3% share compared with Philip Morris' 24.8%, but the lower margin lines gained enough steam to endanger RJR's full-price brand sales. As a solution, RJR in June 1991 unveiled "The Wrap," a new airtight packaging system for Winston designed to add value and justify its full pricing positioning. The "Wrap," was supported by a $22 million print, outdoor and direct mail campaign.

HEADQUARTERS

RJR Nabisco/1301 Avenue of the Americas/New York, N.Y. 10019/Phone: (212) 258-5600.

PERSONNEL, BRANDS, AGENCIES

R.J. REYNOLDS TOBACCO CO.: James Schroer, exec vp-mktg/sales; David Iauco, sr vp-mktg.

Winston, Salem, Vantage: FCB/Leber Katz Partners, New York. Robert Hisch, sr exec vp.

Camel, More and Now: Young & Rubicam, New York. Jane Brite, grp gm.

Century, Magna, Doral, Sterling: Long, Haymes & Carr, Winston-Salem, N.C. John Barclay, vp-mgmt super.

Sports Marketing Enterprises: Long, Haymes & Carr, Winston-Salem, N.C. Logan McCabe, vp/dir-special events.

R.J. REYNOLDS TOBACCO INTERNATIONAL: John Winebrenner, sr vp-mktg.

Camel-worldwide: McCann-Erickson Worldwide, New York. Sanford J. Kornberg, sr vp.

Regional Advertising-Salem, Winston: J. Walter Thompson USA, New York. William C. Thompson, vice chmn-client operations.

RJR NABISCO FOODS GROUP: Robert Springer, sr dir-adv svcs; Louis Rubinacci, dir-media svcs; Beth McMorrow, dir-commercial prodn.

NABISCO BISCUIT CO. (RJR Nabisco Foods Grp.): Sharon Fordham, sr dir-new bus; Fran Myers, sr dir-strategic planning/mkt research; Jeff Myers, sr dir-integrated mktg programs; Allan Falvey, dir-promos; Michael Perry, dir-media svcs; Sandy Putnam, category bus dir-cookies; Eric Shullman, category bus dir-crackers.

Crackers: McCann-Erickson Worldwide, New York. Rob McKinley, sr vp-grp dir.

Cookies: FCB/Leber Katz Partners, New York. Colleen Gowl, exec vp-grp mgmt dir.

NABISCO FOODS CO. (RJR Nabisco Foods Grp.): Daniel Clark, sr vp-mktg/research/devel planning; Alice Limina, sr dir-planning; Roger Wagner, Charlesanna Ecker, Marc Schoenholz, sr dirs-mktg; Richard Fischetti, dir-mkt research.

A-1 Steak Sauce, Grey Poupon, Ortega Mexican Foods, College Inn: Lowe & Partners, New York. Steve Cooper, sr vp-mgmt super.

PLANTERS LIFESAVERS CO. (RJR Nabisco Foods Grp.): Cheryl Bachelder, vp-mktg/bus devel; Roger Adams, dir-Planters; Josephy Collerd, dir-confections; Alan Cox, dir-strategic planning; Larry Bumgart, dir-special mkts; Kathi Mocniak, dir-research/analysis.

Planters nuts & snacks: Lintas:New York. Stephanie Becker, sr vp-mgmt super.

Bubble Yum, Fruit Stripe Gum: Long, Haymes & Carr, Winston-Salem, N.C. Catherine Jarvis, acct mgr.

Lifesavers: FCB/Leber Katz Partners, New York. Lori Donchak, sr vp-grp mgmt dir.

RANK: 38

Sara
Lee
Corp.
Chicago
Ad spending: **$306.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	28,162	36,176	(22.2)
Sunday magazine	5,179	4,412	17.4
Newspaper	1,184	1,718	(31.1)
Outdoor	208	43	389.2
Network TV	74,273	98,272	(24.4)
Spot TV	16,969	28,582	(40.6)
Syndicated TV	11,508	6,499	77.1
Cable TV networks	3,380	3,571	(5.6)
Network radio	2,051	462	343.9
Spot radio	2,612	1,621	61.1
Measured media	145,513	181,356	(19.8)
Unmeasured	161,200	200,900	(19.8)
Total	306,713	382,256	(19.8)
By top brands	**1990**	**1989**	**% chg**
Leggs hosiery	25,545	28,314	(9.8)
Hanes underclothing	16,608	31,781	(47.7)
Hillshire Farms meats	13,715	10,959	25.2
Hanes hosiery	12,370	21,460	(42.4)
Hanes sportswear	8,961	7,357	21.8
Aris Isotoner slippers	7,299	11,286	(35.3)
Ball Park meats	6,936	4,553	52.4
Aris gloves	5,175	7,576	(31.7)

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	12,381	11,606	6.7
Earnings	535	470	13.8
Division sales	**1991**	**1990**	**% chg**
Packaged meats	5,124	4,959	3.3
Coffee & grocery	1,938	1,834	5.7
Personal products	4,103	3,757	9.2
Household, personal care	1,216	1,060	14.7

CORPORATE PROFILE

Hosiery and knitwear, rather than the traditional bakery unit, are cooking these days at Sara Lee Corp.

That trend will be even more pronounced with the addition of Playtex Apparel, including such brands as Playtex, Cross Your Heart and I Can't Believe It's a Girdle, to the company. The buyout was announced this August.

First Boston Corp. earlier this year estimated Sara Lee brands accounted for 11% of the bra market, followed by Playtex's 10.4%. Sara Lee's intimate apparel lines include Bali and Hanes Her Way.

L'eggs, the hosiery brand that helped give Sara Lee a national profile, switched its pantyhose packaging this year—a move widely reported.

The new carton, to reach national distribution by early 1992, still shows a silhouette of the signature egg and is made entirely from recycled paperboard.

L'eggs holds an estimated 55% of hosiery sales in food, drug and discount stores, which account for 60% of all hosiery sales in the $2.2 billion market.

Spending was to be up significantly this year; last year the brand received $25.5 million, down 9.8%.

The Liz Claiborne designer line of mid-price hosiery was introduced in late 1990. It attracted $2.4 million in media spending.

In September 1990, the company rolled out Sara Lee Free & Light, a seven-product line of frozen desserts, following rival Entenmann's successful introduction of fat-free, shelf-stable baked goods.

Similarly, Sara Lee's meat division offered new "light" products, including Ball Park Lite hot dogs, Jimmy Dean Light sausage, Mr. Turkey deli-style lunch meats and a full line of Bryan Light meats.

Bryan Foods named Ogilvy & Mather, Atlanta, to succeed Lintas:New York on its $5 million account this June. Sara Lee in 1990 had consolidated $100 million in advertising and promotion at Lintas.

One of the fruits of the consolidation was a cross-branded product line, Sara Lee deli meats, rolled out by Bil Mar Foods this summer.

The company's media spending for 1990 fell 19.8% largely due to a drop in the Hanes media budget—down 38% to $37.9 million.

HEADQUARTERS

Sara Lee Corp./Three First National Plaza/Chicago, Ill. 60602-4260/Phone: (312) 726-2600.

PERSONNEL, BRANDS, AGENCIES

SARA LEE MEATS GROUP: George Bryan, sr vp-ceo; Ed Jenkins, vp-bus devel.

BIL MAR FOODS (Sara Lee Meats Grp.): E. James Weber, vp-sales/mktg, retail div; Steve Michaelson, dir-mktg, retail div; George Chivari, vp-sales/mktg, foodservice div; Dan Lennon, dir-sales, foodservice div; Warren Waters, vp-deli div; Mike Briggs, mgr-mktg, deli div.

Bil Mar Foods, Mr. Turkey: Retail: Lintas:Campbell-Ewald, Detroit. William Case, sr vp-mgmt super. Foodservice: The Food Group, New York. Ken Seiter, acct mgr. Deli: Lintas:New York. Russ Schaff, sr acct exec.

BRYAN FOODS (Sara Lee Meats Grp.): Bryan Foods: Rick Lowry, vp-mktg, retail; John Bryan III, dir-sales, foodservice; Pat MacGhee, natl sales/mktg mgr-shelf stable. Seitz Foods Inc.: Rick Benward, vp-sales/mktg. State Fair Foods: Robert Greenberg, dir-mktg.

Bryan Foods: Ogilvy & Mather, Atlanta. Neill Cameron, mg dir.

State Fair Foods: Larkin, Meeder & Schweidel, Dallas. Barbara Dressler, acct super.

GALLO SALAME (Sara Lee Meats Grp.): Ron Beltramo, dir-mktg.

Lewis, Broward & Associates, Oakland, Calif. Fred Whelan, acct exec.

HILLSHIRE FARM & KAHN'S (Sara Lee Meats Grp.): Greg Sykes, vp-retail sales/mktg; Dick Dedden, vp-trade mktg; Scott Pursley, vp-consumer mktg; Jay Leigeber, dir-mtkg, smoked/semi-dry sausage.

Hillshire Farm meats, Kahn's meats: Lintas:USA, New York. Peter Barnet, exec vp. Natl mktg/media svcs: Sive Associates, Cincinnati. Phil Mandel, vp-mktg planning.

HYGRADE FOODS (Sara Lee Meats Grp.): Margaret Riley, vp/dir-mktg.

Lintas:Campbell-Ewald, Detroit. Peter Barnet, exec vp.

JIMMY DEAN FOODS (Sara Lee Meats Grp.): Ginna Domm, vp-mktg, retail; Bob Holliday, vp-foodservice.

Lintas:USA, New York. Neill Meyers, exec vp/mgmt super.

SARA LEE BAKERY: Joe Kiely, exec vp; Richard Seban, dir mktg.

Lintas:USA, New York. Peter Barnet, exec vp.

BORDEN FOODS: Billy D. Brown, vp-sales/mktg; Robert Whitsitt, dir-mktg.

DESIGN FOODS: Hal Carper, vp-sales/mktg.

Banowetz & Co., Dallas. Leon Banowetz, owner.

PYA/MONARCH: George T. Watson, vp-marketing/procurement; Mike Stiles, mgr-mktg/procurement.

SUPERIOR COFFEE & FOODS: John Hughes, vp-sales/mktg; Mary Kay Buettgen, dir-mktg; Ralph Russo, vp-retail/gourmet.

L'EGGS PRODUCTS: John Letzler, vp-mktg; Steve Lineberger, Eva Wu, Jim Hines, Bob Scott, mktg dirs.

L'eggs consumer adv: Saatchi & Saatchi Advertising, New York. Michael Donahue, exec vp-mgmt dir.

L'eggs retail adv: Lintas Communications, New York. Sheila Sasser, sr vp-grp dir.

HANES HOSIERY: Carol Mabe, vp-mktg; Charlotte Farrior, dir-designer brands; Davi McBride, dir-mktg, retail; Rosanne Wallace, dir-Hanes; Steve Halbreich, dir-Isotoner/Fitting Pretty.

Hanes hosiery: Saatchi & Saatchi Advertising, New York. Michael Donahue, exec vp-mgmt dir.

Hanes Fitting Pretty hosiery: Long, Haymes & Carr, Winston-Salem, N.C. Maureen Dunkley, acct exec.

Donna Karan hosiery: Arnell Bickford, New York. Peter Arnell, Ted Bickford, owners.

Liz Claiborne hosiery: Altschiller Reitzfeld/Tracy-Locke, New York. Jerry Dak, vp-mgmt super.

HANES & HANES HER WAY KNIT PRODUCTS: Jim DeRose, pres; John Ceneviva, vp-mktg; Lisa Hudspeth, dir-mktg, Hanes Her Way Panties; Paul Snyder, dir-mktg, Hanes underwear; Fran Brau, dir-mktg, Hanes/Hanes Her Way activewear; Kirk Beaudin, pres-Hanes Screenprint; Steve Lineberger, vp-mktg, Hanes Screenprint; Meg McGee, dir-mktg, Hanes Screenprint T-shirts; Jim Ostrowski, vp-sales/mktg, Hanes Intl.

Long, Haymes & Carr, Winston-Salem, N.C. Bill Britt, mgmt super-men's wear; Bill LeVasseur, mgmt super-Hanes Her Way/Fitting Pretty; Patrick O'Sullivan, mgmt super, Hanes/Hanes Her Way promcs-retail mktg.

BALI: Mary Kay Edwards, vp-mktg/merch; Steve Foss, dir-mktg; Ted Cooper, vp-mktg, Hanes Her Way Foundations; Chuck Nesbit, dir-mktg, Hanes Her Way Foundations.

Saatchi & Saatchi Advertising, New York. Michael Donahue, exec vp-mgmt dir.

CHAMPION: Terry Owen, pres; Paul Wold, vp-mktg; Ward Wilson, vp-merch; Cliff Bull, vp-dir, graphics & comms.

Champion athletic apparel & footwear: Rumrill-Hoyt, Rochester, N.Y. Helen Hutchings, acct super.

ADAMS-MILLIS: George Burfeind, pres-ceo; Don Fought, dir-mktg, Hanes Bill Blass Collection/Hanes Her Way/Natural Moves; Ann Thomason, Julianne Golden, Bruce Peoples, mktg mgrs.

ARIS ISOTONER: George Sokolowski, vp-mktg/adv.

Media buying: Saatchi & Saatchi Advertising, New York. Michael Donahue, exec vp-mgmt dir.

CANADELLE:

Wonderbra, Daisy Fresh: The Academy, Ogilvy Communications, Montreal. Ross Cammalleri, grp dir.

COACH LEATHERWARE: Michael Colemen, vp-mktg; Catherine Sadler, dir-comms.

Kirshenbaum & Bond, New York. John Bond, pres.

SARA LEE/DOUWE EGBERTS: Jack Rickenbach, grp prod mgr-Kiwi Brands.

Kiwi Brands, Ty-D-bol: FCB/LGK, Philadelphia. Robert W. Schell, vp-grp mgmt super.

RANK: 91

Schering-
Plough
Corp.
Madison, N.J.
Ad spending: **$124.9 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	20,948	18,529	13.1
Sunday magazine	29	0	NA
Newspaper	361	1,611	(77.6)
Outdoor	237	77	208.3
Network TV	28,464	32,019	(11.1)
Spot TV	4,568	4,348	5.1
Syndicated TV	2,863	3,380	(15.3)
Cable TV networks	1,593	3,140	(49.2)
Network radio	995	7,804	(87.3)
Spot radio	299	1,794	(83.3)
Measured media	60,357	72,702	(17.0)
Unmeasured	64,500	77,700	(17.0)
Total	124,857	150,402	(17.0)
By top brands	**1990**	**1989**	**% chg**
Drixoral 12-hour cold tablets	10,879	15,126	(28.1)
Dr. Scholls products	8,666	7,465	16.1
Complements contact lenses	7,887	0	NA
Correctol laxative	7,828	7,029	11.4
Tinactin medication	6,293	7,693	(18.2)

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SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	3,323	3,158	5.2
Earnings	565	471	19.9
U.S.	**1990**	**1989**	**% chg**
Sales	1,890	1,749	8.1
Operating profit	572	523	9.3
Division sales	**1990**	**1989**	**% chg**
Pharmaceuticals	2,586	2,208	17.1
Healthcare products	618	627	(1.4)

CORPORATE PROFILE

Although Schering-Plough Corp. two years ago sold Maybelline Co. to concentrate on pharmaceuticals, its ethical drug business is discovering money is to be made in the consumer market.

Schering-Plough in late 1990 moved two ethical drugs into over-the-counter sales: Lotrimin, an athlete's foot treatment, and Gyne-Lotrimin, a preparation for vaginal yeast infections.

After receiving FDA approval last year to market Lotrimin as both an OTC and prescribed product, Schering-Plough spent almost $2 million to promote its consumer launch.

Schering-Plough doled out $6.8 million in the first quarter of 1991 to support Gyne-Lotrimin, the first OTC preparation for vaginal yeast infections.

Schering-Plough is working with Dow Chemical's Marion Merrell Dow to move Carafate, a prescription anti-ulcer product, to OTC for treatment of upset stomach, heartburn and acid indigestion.

Separately, Schering-Plough continued to provide strong media support for Dr. Scholl's footcare products which rose 11.7% to $14.4 million in 1990, and spending for Coppertone suntan products almost quadrupled to $2.3 million in 1990.

Coppertone maintained its position as the leader in suntan products; it marked a slight share increase, to almost 19%, while its nearest competitors were flat. Second-place Hawaiian Tropic, from Tanning Research Labs, was flat with an 11.3% share. This year, Schering-Plough released Coppertone Sport, a waterproof and sweat-resistant sunscreen designed for athletes.

Among its respiratory OTC lines, Afrin, heretofore a nasal spray, was introduced in tablet form and gained an Afrin Saline Mist line extension. Drixoral cold remedy line got a Drixoral Sinus spinoff, a product offering consumers 12-hour relief. Drixoral spending was down 28.1%. Afrin has only drawn minimal consumer ad support.

Wesley-Jessen, the vision care unit, in April 1990 released Complements, a new line of colored contact lenses. Media dollars were shifted from the DuraSoft line to Complements.

HEADQUARTERS

Schering-Plough Corp./One Giralda Farms/Madison, N.J. 07940-1000/Phone: (201) 822-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE MEDIA BUYING: Schering-Plough HealthCare Prods. Adv. Corp. (in-house): Russell Elliot, pres; Ron Mednick, vp-media planning; Steve Romines, vp-media purchasing.

SCHERING-PLOUGH HEALTHCARE PRODUCTS DIV: David E. Collins, pres; Richard Whittaker, sr vp-OTC sales/mktg; Fred Fritz, sr vp-footcare sales/mktg.

Complex 15, Correctol, Dr. Scholl's insoles, Gyne-Lotrimin, Lotrimin AF, Solarcaine, Tropical Blend, Water Babies: Cadwell Davis Partners, New York. Elliot Glazer, exec vp-dir, acct svcs.

Afrin, Coppertone, Dr. Scholl's Back Guard, Dr. Scholl's Clear Away, Dr. Scholl's Hidden Comfort, Dr. Scholl's Smooth Touch, Dr. Scholl's corn & callus products: Della Femina, McNamee, New York. Larry Smith, vp-mgmt super, Afrin; Robert Peterson, vp-mgmt super, Coppertone; Joanne Tilove, vp-mgmt super, Dr. Scholl's.

Chlor-Trimeton, Drixoral, Shade, Tinactin: Warwick Baker & Fiore, New York. Rebecca Randall, vp-acct super.

PHARMACEUTICAL OPERATIONS DIV: Rodolfo Bryce, pres-Schering Laboratories; Robert Baldini, sr vp-sales/mktg, Key Pharmaceuticals-Schering Labs; Glenn Horrocks, vp-U.S. mkts/sales, S-P Animal Health; Thomas F. Battaglini, sr dir-mktg, S-P Animal Health; John F. Kopf, dir-mktg svcs, S-P Animal Health; Charles Stroupe, pres, Wesley-Jessen; Robert Cullen, vp-sales/mktg, Wesley-Jessen; Thomas Steiner, sr dir-professional mktg, Wesley-Jessen.

Durasoft contact lenses, Aquaflex contact lenses, Complements contact lenses, other lens solutions: Young & Rubicam, Chicago. Tim Pretzch, vp-acct super.

RANK: 81

Seagram Co.

New York

Ad spending: **$135.3 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	31,847	29,362	8.5
Sunday magazine	1,440	1,379	4.4
Newspaper	2,227	2,920	(23.7)
Outdoor	8,892	9,021	(1.4)
Network TV	30,852	34,707	(11.1)
Spot TV	13,694	10,238	33.8
Syndicated TV	9,294	9,418	(1.3)
Cable TV networks	991	703	41.0
Network radio	778	0	NA
Spot radio	674	4,054	(83.4)
Measured media	100,689	101,802	(1.1)
Unmeasured	34,600	35,000	(1.1)
Total	135,289	136,802	(1.1)
By top brands	**1990**	**1989**	**% chg**
Tropicana juices	42,181	46,799	(9.9)
Seagrams Canadian	12,338	13,595	(9.2)
Seagram wines	8,186	10,286	(20.4)
Tropicana Juice Sparkler	6,344	0	NA
Chivas liquor	5,048	5,580	(9.5)

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	6,127	5,582	9.8
Earnings	756	711	6.4
U.S.	**1991**	**1990**	**% chg**
Sales	2,779	2,742	1.3
Operating income	67	50	34.0
Division sales	**1991**	**1990**	**% chg**
Spirits & wine	4,847	4,531	7.0
Fruit juices	1,280	1,051	21.8

CORPORATE PROFILE

Seagram Co. was displaced by Grand Metropolitan's Heublein unit as the top seller of distilled spirits in the U.S. last year.

Seagram's share of the estimated $159.6 billion liquor market in 1990 rose to 13.8% from 13.5% as media spending was essentially flat. Heublein's share climbed to 14.3% from 13.3%, according to Wheat, First Securities.

The House of Seagram, Seagram's domestic distilled-spirits unit, moved cautiously in the new-product arena, with much of the activity focused on reduced-alcohol products.

In test markets, it added Coyote, a flavored 70-proof tequila, and continues to test Mount Royal Light, a reduced-alcohol whiskey. But it has pulled Takara Sochu, a Japanese spirit, from test.

In June 1990, Seagram rolled out Wyborowa Polish vodka, its first national product introduction in years. An ad campaign that began a year later whimsically poked fun at the difficulty in pronouncing the brand's name (Vee-ba-ROH-va) with the theme, "If you can't say it, you can't have it."

Among developments in the latest of several corporate reorganizations, Seagram created a Global Brands division to better handle worldwide marketing.

A consistent worldwide campaign for Martell cognac, for which it acquired U.S. distribution rights from Brown-Forman Corp., began last year. This June, Seagram began a similar effort, valued at $40 million, for Chivas Regal scotch whisky, themed "There will always be a Chivas Regal."

Mumm champagne also will get the global ad treatment.

Seagram Beverage Co. early this year entered test markets with Taos, a sparkling wine-based light cooler marketed as an aperitif, with less than 5% alcohol.

Tropicana Products, the leading orange-juice marketer, rolled out Pure Tropics, a line of exotic 100% juice blends, and ruby-red grapefruit juice.

After the successful introduction of Tropicana Twister, a bottled juice blend, the company brought to market Tropicana Sparkler.

All Tropicana lines were backed with $48.5 million in media spending, up 3.6%, as the company's share of the orange-juice market increased to 21.8%, up from 20.2%, according to ScanTrack figures, while Coca-Cola Foods' leading Minute Maid brand had a 22.9% share, down 0.4 points. Tropicana also got a new leader, Bill Weintraub, formerly exec VP-marketing and sales for Kellogg Co.'s U.S. food products division, who replaced Robert Urbain, now general manager of Campbell Soup Co.'s Pepperidge Farm unit.

At the Seagram Chateau & Estate Wine Co., Frankfurt Gips Balkind was named to handle Perrier-Jouet champagne, and is scheduled to break a new campaign in October.

Seagram reported first-half 1990 net income fell 14%, to $337 million, on total revenues of nearly $2.8 billion, a 2.5% gain. The company attributed much of the income decline to reduced earnings at E.I. du Pont de Nemours & Co., in which Seagram holds a 24.5% stake. But Seagram's own operating income also fell 7.8% in the first half, to $285 million. Company President Edgar Bronfman Jr. said Seagram expects total 1991 operating income to exceed that of 1990.

HEADQUARTERS

Seagram Co./1430 Peel St./Montreal, Quebec H3A 1S9/Canada.

The House of Seagram/375 Park Ave./New York, N.Y. 10152/Phone: (212) 572-7000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Thomas K. McInerney, exec vp-mktg; Angelo Vassallo, vp-grp mktg dir, North American whisky grp; Peter Meola, vp-grp mktg dir, scotch/imports grp; Carl Horton, vp-grp mktg dir, white goods group; Rich McCarthy, vp-grp mktg dir, perennials grp.

Boodles gin, Captain Morgan original spiced rum, Chivas Regal, Crown Royal, Leroux cordials, Lord Calvert Canadian, Martell cognac, Mumm champagne, Myers's rum, Royal Salute, Wyborowa vodka, corporate moderation campaign: DDB Needham Worldwide, New York. Kent DeFelice, exec vp-bus unit head.

Seagram's gin, 7 Crown, The Glenlivet, Seagram's V.O., Mount Royal Light: Ogilvy & Mather, New York. Neve Savage, sr vp-exec grp dir.

Jameson premium whiskey, Coyote tequila, Herradura tequila: Wells Rich Greene BDDP, New York. Mark D. Abrams, sr vp-acct grp head.

Ethnic adv: The Mingo Group, New York. Samuel Chisholm, pres.

SEAGRAM BEVERAGE CO.: Mark Taxel, exec vp-mktg; Henry Hawley, vp/dir-mktg, beverage-alcohol prods/new prod devel; Robert Berger, vp-dir mktg, non-alcoholic beverages.

Seagram wine coolers, Taos: Wells Rich Greene BDDP, New York. Fred Reffsin, sr vp-mgmt super.

SEAGRAM CLASSICS WINE CO.: James L. Bareuther, exec vp-sales/mktg; Louis Keyes, vp-mktg.

Sterling Vineyards, The Monterey Vineyard, Mumm Cuvee Napa sparkling wine: Mandlebaum Mooney Ashley, San Francisco. Michael Goefft, gm.

Mumm's champagne: DDB Needham Worldwide, New York. Kent DeFelice, exec vp.

Divisional corporate adv: Grey Advertising, San Francisco. Ellen Rosenstein, acct super.

SEAGRAM CHATEAU & ESTATE WINES CO.: John W. Laird, exec vp-sales/mktg; Nancy Rugus, vp-mktg.

Perrier-Jouet champagne: Frankfurt Gips Balkind, New York. Pat Baird, acct dir.

Sandeman port and sherry: In-house.

TROPICANA PRODUCTS CO.: Bill Weintraub, sr vp-mktg.

Tropicana orange juice, Homestyle orange juice, Pure Premium orange juice, Pure Premium Homestyle orange juice; Tropicana Twister; Tropicana Twister Light; Tropicana Pure Tropics; Tropicana grapefruit juice, ruby-red grapefruit juice, apple juice, lemonade, fruit punch: Leo Burnett USA, Chicago. Mike Hall, sr vp-acct dir.

Tropicana Sparkler: DDB Needham Worldwide, New York. Kent DeFelice, exec vp.

RANK: 3

Sears, Roebuck & Co.

Chicago

Ad spending: **$1,507.1 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	31,233	21,329	46.4
Sunday magazine	5,921	16,034	(63.1)
Newspaper	136,796	154,924	(11.7)
Outdoor	1,072	908	18.1
Network TV	253,824	197,080	28.8
Spot TV	37,517	58,510	(35.9)
Syndicated TV	13,623	4,454	205.9
Cable TV networks	19,768	13,347	48.1
Network radio	71,253	71,660	(0.6)
Spot radio	19,759	36,053	(45.2)
Measured media	590,786	574,299	2.9
Unmeasured	916,300	890,700	2.9
Total	1,507,086	1,464,999	2.9
By top brands	**1990**	**1989**	**% chg**
Sears stores general	161,205	198,898	(19.0)
Sears household	133,029	108,409	22.7
Discover credit card service	49,846	41,058	21.4
Sears apparel	44,003	34,719	26.7
Sears automotive	32,255	32,518	(0.8)
Allstate auto insurance	28,474	20,595	38.3
Allstate homeowners insurance	23,434	18,359	27.6
Coldwell Banker & Co.	16,858	12,950	30.2
Dean Witter Reynolds	16,777	12,932	29.7
Allstate insurance	15,968	15,830	0.9

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	55,972	53,794	4.0
Earnings	902	1,509	(40.2)
Division sales	**1990**	**1989**	**% chg**
Sears Merchandise Group	31,986	31,599	1.2
Allstate Insurance Group	18,199	16,803	8.3
Dean Witter Financial Services	4,607	4,065	13.3
Coldwell Banker Real Estate	1,377	1,448	(4.9)
Corporate, other	152	146	4.1

CORPORATE PROFILE

Sears, Roebuck & Co. may owe its reputation to retailing, but financial services, insurance and real estate have become its lifeblood.

Sears Merchandise Group in a year's time dropped to third place among the nation's retailers behind Wal-Mart Stores and Kmart Corp., despite a massive restructuring in 1988, a new merchandising strategy in 1989 and the com-

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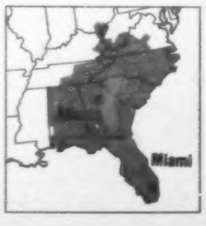

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pany's scramble to turn its stores into a series of specialty departments in 1990.

Chairman Edward Brennan asked shareholders once again to be patient and await the long-promised turnaround, which he said will occur in 1992 and beyond.

Early this year, Sears put into effect a plan to cut by yearend 33,000 jobs, or 10% of the staff from its merchandise group and catalog operations. Mr. Brennan also said Sears is cutting $70 million in internal advertising costs, though media spending levels will remain unaffected.

Corporate heads have rolled, too, with the resignation in February of merchandise group President-Chief Operating Officer Michael Bozic, who was replaced by Alfred Goldstein, specialty merchandising manager.

In January, Sears closed its much-ballyhooed 47-store McKids children's apparel chain launched in 1988, citing unsatisfactory results. Its McKids private-label apparel will continue to be marketed in its department stores and its catalog.

Attention has also been refocused on Sears' unprofitable $4 billion catalog division. Robert M. Abramson was named senior VP-marketing and strategic planning for the catalog and the first-ever national ad campaign for the catalog was launched in February, stressing Sears' long heritage and reliability.

Measurable progress was made in transforming Sears' department stores into specialty stores as the company announced it had opened Tire & Auto Centers in all 850 of its stores. It was Sears' second completed rollout after Brand Central, the appliance and electronics format Sears launched in its stores in 1988.

This year Sears doubled its Homelife furniture formats to 70 and added 12 home-office equipment departments, called Office Center at Sears.

Sears returned to a platform of guaranteeing satisfaction and value from its flirtation with everyday low prices. In May, Mr. Brennan announced a new "Sears Best Buys" program in which certain items are featured at sale price each month, plus the "Five Star Value" program of selecting certain national brand-name items for periodic sales.

This July, Sears introduced the KidVantage WearOut Warranty program, an industry first in which it promises to replace any children's apparel when it wears out, while the child still wears the same size. Sears also announced a frequent-buyer program for children's apparel, offering a 10% discount on every $50 purchase of children's apparel and 15% off purchases of $100 or more.

Spending for TV and print advertising for Sears' core household brands increased *22.7% in 1990 to $133 million*; other categories of ad spending for the Sears Merchandise Group held steady. The merchandise group continues its steady relationship with Ogilvy & Mather, which in mid-1991 won back the $5 million jewelry assignment that was awarded to the Bloom Agency for [illegible] year beginning in 1990.

Dean Witter Financial Services Group continues to be Sears' strongest unit as its stock brokerage, investment and credit card services thrive. Discover credit cards numbered 37.8 million in 1990, an increase of 15.4% over the previous year. Merchant outlets accepting the card grew 15.2% to 1.24 million.

In March, 5-year-old Discover launched its first new TV campaign in three years under the theme "It pays to Discover." This March, Dean Witter tried to launch the new Prime Option Visa credit card, but Visa International's challenge of the card in federal court has suspended issuance of the card indefinitely.

Results from Allstate Insurance Cos. and Coldwell Banker Real Estate Group weren't as strong in 1990 due to higher-than-average insurance claims for catastrophes and a downturn in the residential real estate market.

HEADQUARTERS

Sears, Roebuck & Co./Sears Tower/Chicago, Ill. 60684/Phone: (312) 875-2500.

PERSONNEL, BRANDS, AGENCIES

SEARS MERCHANDISE GROUP: Laurence E. Cudmore, pres-retail; Everett L. Buckardt, pres-catalog/dir mktg; Alfred G. Goldstein, pres-specialty merch; Allan B. Stewart, sr exec vp-retail store operations; Matthew A. Howard, sr vp-mktg, buying services; Warren E. Flick, vp-men's/children's apparel; Forrest R. Haselton, vp-automotive; William E. Patterson, vp-home improvements; Eric D. Saunders, vp-home fashions; Marvin M. Stern, vp-home appliances/electronics; Wayne G. Williams, vp-women's apparel; Ralph Hoch, natl genl merch mgr; Scott Harding, natl mgr-adv; Robert M. Abramson, sr vp-mktg/strategic planning, Sears Catalog/dir mktg.

Black consumer adv: Vince Cullers Advertising, Chicago. Jeffrey Cullers, mgmt super.

Hispanic adv: Mendoza, Dillon & Asociados, Newport Beach, Calif. Eduardo Del Rivero, exec vp-client svcs.

Sears Merchandise Group: Ogilvy & Mather, Chicago. Austin McGhie, sr vp-gm.

Sales Promotion: Ogilvy & Mather, Chicago. Dick Cooper, sr vp-dir.

Sears Business Centers: Barkley & Evergreen, Shawnee Mission, Kan. Mark Pfefferkorn, vp-mgmt super.

WESTERN AUTO SUPPLY CO.:

Barkley & Evergreen, Shawnee Mission, Kan. Bob Moore, group head-vp.

ALLSTATE INSURANCE GROUP: John J. Flieder, vp-prod adv; Terre Tuzzolino, asst vp-corp relations; Ken Zarzynski, adv dir; Cynthia Farrow-Miller, Ginny Clark, adv mgrs; Darryl Reynolds, sr mktg project mgr.

Insurance: Auto, Homeowners, Life; Allstate Motor Club: Leo Burnett USA, Chicago. [illegible] Sims, sr vp-acct dir.

DEAN WITTER FINANCIAL SERVICES GROUP: Richard F. Powers, exec vp-dir mktg; William Walsh, first vp-grp adv dir; William Hodges, sr vp-mktg officer, Discover Card; Arthur Barmash, dir-grp adv/mktg comms, Discover Card.

Dean Witter brokerage-dealer: Leo Burnett USA, Chicago. Bill Boris, exec vp-client svcs dir.

Discover Card: DDB Needham Worldwide, Chicago. *Ray Gillette, grp acct dir.*

COLDWELL BANKER REAL ESTATE GROUP: Kristine Sandrick, vp-corp comms; G. Lane Barnett, first vp-dir prod devel/mktg, Coldwell Banker Residential Grp; Sondra Byrnes, vp-primary mktg, Sears Mortgage Corp.

Coldwell Banker-residential: Grey Advertising, Los Angeles. Larry Varnes, exec vp-mgmt rep.

RANK: 55

SmithKline Beecham

London

Ad spending: **$191.4 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	3,001	4,032	(25.6)
Sunday magazine	96	348	(72.5)
Newspaper	96	230	(58.2)
Outdoor	[illegible]	3	NA
Network TV	73,153	68,519	6.8
Spot TV	5,166	4,914	5.1
Syndicated TV	14,149	18,782	(24.7)
Cable TV networks	4,746	3,489	36.0
Network radio	1,451	1,719	(15.6)
Spot radio	533	660	(19.2)
Measured media	102,392	102,696	(0.3)
Unmeasured	89,000	89,300	(0.3)
Total	191,392	191,996	(0.3)
By top brands	**1990**	**1989**	**% chg**
Aquafresh toothpaste	21,671	20,919	3.6
Tums antacid	13,048	10,563	23.5
Contac cold products	12,748	16,773	(24.0)
Massengil douche	9,352	10,305	(9.2)
Oxy medicated products	7,556	5,348	41.3
Geritol supplements	7,253	4,283	69.4
N'ice	6,472	4,064	59.3
Sucrets	6,438	6,014	7.1
Sominex sleeping aid	5,246	4,465	17.5

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	9,195	9,451	(2.7)
Earnings	1,635	251	551.5
U.S.	**1990**	**1989**	**% chg**
Sales	3,874	3,783	2.4
Trading income	896	641	39.8
Division sales	**1990**	**1989**	**% chg**
Pharmaceuticals	4,588	4,319	6.2
Consumer brands	2,590	2,378	8.9
Clinical labs	917	936	(2.1)
Animal health	593	596	(0.6)

CORPORATE PROFILE

Total ad spending at SmithKline Beecham remained flat in 1990 as the pharmaceutical giant continued to reduce debt following the 1989 merger of SmithKline Beckman and Beecham Group. More than $1.2 billion in assets have been sold since the merger.

Sales for SmithKline's leading brand, Aquafresh, rose 28% worldwide last year. The brand benefited from the company's largest media investment. Aquafresh is now moving beyond toothpaste, with a line of branded toothbrushes rolling nationally.

The Oxy line of acne medications gained 2 percentage points in the U.S. for a 26% market share.

Geritol brand tonic got the biggest percentage ad hike among the top brands, up 69.4% to $7.25 million.

The N'ice brand of sore-throat lozenges *added a line of vitamin C lozenges.* Massengill kept its position as the No. 1 feminine douche with a 52% share, said Julie Wolfe, analyst with Kline & Co. Media spending stayed steady at $10.9 million for douches and towelettes combined.

Tums sales rose 27.4%, giving it a 13%

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For more information:
Trudi Rohla, Senior Vice President
212-481-0770

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* ABC Fas-Fax Reports, 3 months ending March 31, 1991

St. Petersburg Times
Tampa Bay's Largest Newspaper

share and the No. 2 spot in the $877 million antacids and anti-gas aids category, she said.

This fall SmithKline is extending the Contac brand with Contac Severe Cold & Flu Hot Medicine, positioned against Sandoz Pharmaceuticals Corp.'s Thera-Flu. The Contac brand claims 8% of the cold medications market, Ms. Wolfe said.

About $4 million in TV spending will support the new product, while new Contac Day & Night Cold & Flu caplets will get $5.3 million in support this fall.

The company maintained strong sales for pharmaceuticals in the U.S., with total prescriptions for SmithKline products rising 7% while the market grew just 1%, according to company estimates.

A big hit needs to follow Tagamet, the ethical drug for treating peptic ulcers that generated $1.2 billion in worldwide sales in 1990, half of that from the U.S. Tagamet's active ingredient, cimetidine has been coming off patent. Tagamet sales dropped 6% worldwide in 1990. In the U.S., where Tagamet loses patent protection in 1994, its share dropped 4 percentage points to 26% in 1990 as competition heated up, particularly from Glaxo Holdings' Zantac. An OTC version of Tagamet is under development.

HEADQUARTERS

SmithKline Beecham/SB House/Great West Road, Brentford/Middlesex, TW8 9BD/England.

SmithKline Beecham/One Franklin Plaza/Philadelphia, Pa. 19101/Phone: (215) 751-4000.

PERSONNEL, BRANDS, AGENCIES

SMITHKLINE BEECHAM PHARMACEUTICAL: Fred Kyle, pres-commercial operations; Jean-Pierre Garnier, pres-N. Amer.; Angeris N. Karabelas, vp-mktg.

Engerix-B, Tagamet: STN, Rutherford, N.J. Barbara Falco, Howard Laskau, vps-acct supers.

Eminase, Augmentin, Timentin: Frank J. Corbett Inc., Chicago. Patrick McTeague, vp.

Ancef, Tazicef: Ted Thomas Associates, Philadelphia. Don Phillips, sr vp.

Amoxil, Compazine, Bactroban: In-house.

SMITHKLINE BEECHAM CONSUMER BRANDS U.S.: Gordon J. McLaren, vp-dir, mktg; Douglas B. Cox, vp-dir, personal care; Paul J. Fraioli, vp-dir, healthcare; Maurice L. Kelley, vp-dir, mktg svcs; Warren C. Siddal, dir-media.

Contac, Geritol, Massengill, Sucrets, Vivarin: Grey Advertising, New York. Matt DeSimone, vp-mgmt super, Aquafresh; Allison Bailey, vp-mgmt super, Contac/Massengill; Tony Thurston, vp-mgmt super, Geritol/Vivarin/Sucrets.

Lectric Shave, N'ice, Sominex, Nature's Remedy: Ogilvy & Mather, New York. Neve Savage, sr vp-grp dir.

Ecotrin, Orafix, Oxy, Tums: Jordan, McGrath, Case & Taylor, New York. Ellen Fields, vp-mgmt super, Tums/Ecotrin; Kathryn Ryan, vp-mgmt super, Oxy/Orafix.

A-200: Carrafiello-Diehl & Associates, Irvington, N.Y. Jerry Carrafiello, acct exec.

Feosol: Gross Townsend Frank Hoffman, New York. Andrea Seiden, acct exec.

RANK: 26

Sony Corp.

Tokyo

Ad spending: **$410.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	53,244	51,481	3.4
Sunday magazine	26,330	20,952	25.7
Newspaper	36,103	30,273	19.3
Outdoor	340	169	101.2
Network TV	63,080	51,901	21.5
Spot TV	42,942	40,599	5.8
Syndicated TV	11,522	4,487	156.8
Cable TV networks	9,686	5,757	68.3
Network radio	1,041	615	69.3
Spot radio	1,684	8,498	(80.2)
Measured media	245,971	214,732	14.5
Unmeasured	164,500	143,600	14.6
Total	410,471	358,332	14.6
By top brands	**1990**	**1989**	**% chg**
Tri-Star pictures	66,083	40,544	63.0
Columbia Pictures movies	60,185	73,723	(18.4)
Columbia record & tape clubs	40,525	23,810	70.2
Sony video equipment	24,647	20,179	22.1
Columbia Hse. video supplies & equipment	14,650	21,450	(31.7)
Sony audio equipment	9,651	3,309	191.6
Columbia videogame club	7,423	0	NA
Columbia Hse. video clubs	7,319	15,637	(53.2)
Sony recording tapes	7,005	746	839.4

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	25,649	18,343	39.8
Earnings	829	655	26.6
U.S.	**1990**	**1989**	**% chg**
Sales	7,475	5,466	36.7
Operating income	NA	NA	NA
Division sales	**1990**	**1989**	**% chg**
Video equipment	6,443	4,732	36.1
Audio equipment	6,254	4,604	35.8
Televisions	3,918	2,843	37.8
Other products	3,847	2,678	43.6
Records	3,362	2,898	16.0
Movies	1,827	587	211.2

CORPORATE PROFILE

Sony Corp. sees its new ownership of movie and recording interests as guaranteeing software for its future electronics innovations, and its broader base of operations as an opportunity for "interactive" marketing.

Sony, for example, signed Michael Jackson to a reported $100 million deal that will place him in films, recordings and perhaps games for Sony units. It is looking at building a Sonyland amusement park. A third move comes this winter when Sony's various units combine for the first time to promote products for the Steven Spielberg movie "Hook."

Sony has gone through some significant changes in the last year. Columbia House became a joint venture with Time Warner. Columbia House's $70 million ad spending figures are credited by AA solely to Sony's estimated ad total for 1990.

Sony this August also bought out General Electric Co.'s half interest in its home video venture and renamed the unit Columbia Tri-Star Home Video.

Sony Software became its media unit, including Sony Music Entertainment (formerly CBS Records), Sony Pictures Entertainment (formerly Columbia Pictures Entertainment) and Sony Electronic Publishing (a new unit that will produce games and software). Sony Electronics Group incorporates its hardware businesses.

At Sony Pictures Entertainment, Jon Peters quit in May as co-chairman to return to production for Sony's Columbia Pictures. Separately, Sony split marketing functions for its two major picture units—Columbia Pictures and Tri-Star Pictures.

Sony's big films in the last year included Tri-Star's "Terminator 2: Judgment Day" and Columbia's "City Slickers." Tri-Star's share of film rentals rose to 8% in 1990 from 7%; Columbia's dropped to 5% from 8%.

Through July of this year, Tri-Star ranked sixth in box office shares at 9.6% and Columbia, seventh at 8.8%.

Sony Corp. of America's Consumer Products Group brought out few major new products in the last year, though it expanded its Digital Audio Tape line and introduced a digital remote control that allows its components to talk to each other. In a significant pricing move and a response to competitive pressures, Sony lowered the premium for its Trinitron line.

Instead, Sony devoted more attention and ad spending to the U.S., raising spending as much as 50% for a variety of its mainline products, including camcorders and TVs.

Sony's Trinitron brand held a 6.85% share of U.S. TV sales (up from 6.5%) last year, placing it fourth, according to *Television Digest*. Sony is No. 1 in camcorder sales with an 18% share (up from 15% in 1989). Sony is No. 13 in VCR sales with 3.75% share, up from 2.3%.

Sony's future may hinge on the success of two new products. Late this year Sony will launch its Data Discman, which offers the advantages of computer storage and retrieval in a book-size device. Late next year Sony will launch its Mini Disc system that both plays and records digitally on small compact discs.

That launch will put Sony in a major battle with NV Philips' Philips Consumer Electronics division, which is unveiling competing digital compact cassette technology that plays current audio cassettes but records in a new digital format.

Sony moved advertising for its consumer products division to Leo Burnett USA and indicated it would be stepping up event-oriented promotional activity. Burnett advertising will carry a "Be Sony" theme.

HEADQUARTERS

Sony Corp./ 7-35 Kitashinagawa 6-chome/Shinagawa-ku, Tokyo, 141/Japan.

Sony USA Corp./9 W. 57th St./New York, N.Y. 10019/Phone: (212) 371-5800.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Robert Zito, vp-comms; Koh Shimizu, dir-comms.

SONY CORP. OF AMERICA (U.S. Electronics Grp.): Jeffrey Brooks, sr vp-corp adv/mktg svcs. Sony Consumer Prods.: Larry Barruch, vp-consumer adv; Richard Johnson, dir-consumer adv; Lisa Diliberto, adv mgr-TV prods; Ron Greitzer, adv mgr-video prods; John Heenan, natl adv mgr-audio prods; Janice Breithaupt, adv mgr-personal audio prods. Business & Professional Grp.: Scott Westover, dir-adv. Components & Computer Prods. Grp.: Carol Byrum, mgr-mktg comms.

Sony Trinitron, Sony Walkman, Sony Discman, Sony Data Discman, Handycam, ES: Leo Burnett USA, Chicago. Brian Williams, Melinda Sherman, acct dir.

Sony Business & Professional products: Geer, DuBois, New York. Catherine Basile, acct super.

Sony Components & Computer products: Winkler McManus, San Francisco. Jeff Kahn, acct exec.

Sony Corp. of America-media: Geer, DuBois, New York. Catherine Basile, acct super.

SONY RECORDING MEDIA OF AMERICA (U.S. Electronics Grp.): Bob Basso, vp-adv.

Sony Consumer Tape, Professional Media, Optical Media: Burkhardt & Christy, New York. Joel Fineman, sr vp-acct dir.

SONY PICTURES ENTERTAINMENT (Sony Software Corp.): Tri-Star Pictures: Buffy Shutt, pres-mktg; Kathy Jones, exec vp-mktg; Bill Loper, sr vp-adv. Columbia Pictures: Paula Silver, pres-mktg. Columbia Tri-Star Home Video: Bill Perrault, vp-domestic mktg; Christine Alverez, dir-adv; Cynthia Basciani, exec vp-mktg, worldwide. Loew's Theaters Management Corp.: Susan Fraine, vp-adv/publicity.

Tri-Star Pictures, Columbia Pictures: McCann-Erickson Worldwide, Los Angeles. Jim Surmanek, sr vp-mgmt super/exec media dir.

Columbia Tri-Star Home Video: Media buying: Saatchi & Saatchi DFS/Pacific, Los Angeles. Diane Danvers, sr vp-mgmt super.

Loew's Theaters: Allied Advertising Agency, Boston/New York/Syracuse/Cincinnati. AM Entertainment, New York. Sherman Wolf Advertising, Chicago.

SONY MUSIC ENTERTAINMENT (Sony Software Corp.): Tom McGuinness, sr vp-mktg, Sony Music distribution; Yvonne Erickson, dir-media adv; Arnold Levine, sr vp-creative svcs; Carol Lee Shepard, vp-adv/design. Columbia Records: Jay Krugman, vp-mktg, East coast; Bob Wilcox, vp-mktg, West coast. Epic Records: Larry Stessel, sr vp-mktg; Dan Beck vp-mktg. Sony Classical: Laraine Perri, vp-prod mktg.

Columbia Records, Epic Records, Sony Classical: In-house.

SONY ELECTRONIC PUBLISHING (Sony Software Corp.): Peter Dille, dir-comms.

Sony Imagesoft and Sony Electronic Publishing: CN Communications, Rahway, N.J.; Brad Manier, vp-creative director.

COLUMBIA HOUSE (Sony Software Corp. and Time-Warner Corp.): Sharon Kuroki, sr vp-mktg, music clubs; Richard Capassela, vp-adv, video club; Brian Wood, sr vp-Columbia House video; Harry E[illegible]s, vp-Columbia House video library; Linda Andersen, vp-music club adv.

Columbia House, Columbia House Video Club, Columbia House Video Library, Columbia House Music Club, Columbia House Music Collection: Wunderman Worldwide, New York. Peter Rabar, mg super-grp dir.

RANK: 47

Tandy Corp.

Fort Worth, Texas

Ad spending: **$232.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	13,096	11,180	17.1
Sunday magazine	117	141	(17.2)
Newspaper	40,541	37,633	7.7
Outdoor	16	18	(12.1)
Network TV	21,914	25,065	(12.6)
Spot TV	2,386	3,341	(28.6)
Syndicated TV	1,325	1,563	(15.2)
Cable TV networks	722	1,265	(42.9)
Network radio	5,761	5,632	2.3
Spot radio	299	480	(37.7)
Measured media	86,177	86,319	(0.2)
Unmeasured	146,500	146,800	(0.2)
Total	232,677	233,119	(0.2)
By top brands	**1990**	**1989**	**% chg**
Radio Shack electronics stores	51,743	51,829	(0.2)
Tandy computers	18,729	16,701	12.1
McDuff appliance stores	8,977	7,038	27.6

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	4,562	4,500	1.4
Earnings	195	290	(32.7)

CORPORATE PROFILE

Tandy Corp., faced with sluggish sales from its flagship Radio Shack chain, is adding name brands, upgrading its house brands and expanding into new retailing concepts.

Radio Shack, which saw same-store sales drop 2% for the fiscal year ended June 30, for the first time will sell non-Tandy-made products in its stores beginning this holiday season.

Last month, it began selling big-ticket name-brand audio and video equipment in 140 small-town stores.

Tandy is expanding outside its Radio Shack base, which accounts for about 70% of total revenues. The company in the fourth quarter of calendar 1991 will open six Computer City discount superstores, which will sell Tandy and other brands of personal computers. By 1995, Tandy expects to have 100 of the discount stores in operation and generating sales of $1 billion.

Major expansion is also under way for the nine-store Edge in Electronics chain,

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Seattle
Portland

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which carries Tandy and other name-brand personal electronic products, and the 400-unit chain of McDuff and Video-Concepts stores, that sells big-ticket electronics and appliances made by Tandy and others.

Tandy/Radio Shack, which has long suffered an image of being a purveyor of cheap electronics and gadgets for hobbyists, is also upgrading its house brands. It continues to expand its top-of-the-line Optimus brand for audio components.

Tandy's Memtek Products unit is capitalizing on its Memorex brand name and expanding it beyond audio and videotapes. Tandy will go head-to-head against Sony Corp. of America and Panasonic Co. as it introduces in the fourth quarter of 1991 a line of Memorex-brand TVs, stereos and VCRs in Tandy Corp. and other stores.

The company has high hopes for digital recording technology. It plans to introduce a digital compact cassette player in the first half of calendar 1992. It also continues to work on the development of an erasable/recordable compact disc.

In computers, Tandy has already established a leadership position in multimedia technology that combines text, graphics, sound and animation on a PC. It's GRiD Systems Corp. unit will also continue to push its dominant position in pen-based computer products, which can read handwriting.

Tandy in 1991 abandoned its 200 Radio Shack Computer Center retail stores, which sold to small-to-midsize businesses. Most of its small-business sales come from its outbound sales force anyway.

Last year, Tandy hired Lowell Duncan as its first corporate VP of marketing, and it's searching for a new advertising director. However, Tandy has no plans to move its ad business out of house.

HEADQUARTERS

Tandy Corp.-Radio Shack/1800 One Tandy Center/Fort Worth, Texas 76102/Phone: (817) 390-3700.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Lowell C. Duncan, vp-mktg, Tandy Corp.; Howard Elias, vp-computers, Tandy Corp.; David Beckerman, sr vp-mktg svcs, Radio Shack; James Nichols, sr vp-consumer retail operations, Radio Shack; Robert Miller, vp-consumer merch, Radio Shack; John Patterson, sr vp-Tandy Computers/Tandy Electronics; Bruce Walters, pres-GRiD Systems Corp.; David Beckerman, sr vp-Radio Shack Adv. Dept.; Nan Neureither, media dir-Radio Shack Adv. Dept.; Ed Luedtke, adv/media/bus mgr-Tandy Name Brand Retail Grp. Adv. Dept.; Daniel O'Sullivan, pres-O'Sullivan Industries.

Tandy Corp.-Radio Shack: In-house.

GRiD Systems Corp.: Austin Advertising, San Jose, Calif. Mike Austin, pres.

Tandy Name Brand Retail Group: In-house.

Memtek Products: Richards Group, Dallas. Rod Underhill, principal.

RANK: 85

Thompson Medical Co.

New York

Ad spending: $133.4 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	11,439	8,074	41.7
Sunday magazine	6,552	2,761	137.3
Newspaper	592	1,218	(51.4)
Outdoor	18	35	(48.5)
Network TV	75,530	43,980	71.7
Spot TV	2,323	1,371	69.5
Syndicated TV	9,901	5,937	66.8
Cable TV networks	3,764	6,219	(39.5)
Network radio	0	427	NA
Measured media	110,120	70,023	57.3
Unmeasured	23,300	14,800	57.4
Total	133,420	84,823	57.3
By top brands	**1990**	**1989**	**% chg**
Ultra Slim-Fast	81,183	24,810	227.2
Dexatrim diet aids	14,987	20,931	(28.4)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	NA	NA	NA
Earnings	NA	NA	NA

CORPORATE PROFILE

One thing isn't wasting away in the weight-loss market: ad budgets. In 1990, media spending among players in the U.S. reducing aids category leaped 52.3% to $109.59 million, with products from privately held Thompson Medical Co. accounting for 89.3% of the total.

Slim-Fast and Ultra Slim-Fast products alone upped their media ante a collective 142.4% to $82.7 million in 1990.

Ultra has quickly come to dominate plain Slim-Fast. Ultra Slim-Fast is the "new and improved" version that's thicker, with more fiber, vitamins and minerals. It's the version spawning the line extensions and the reason the product is now thought of as a meal replacement rather than an appetite suppressant.

Until December 1990, Slim-Fast and Ultra Slim-Fast products were a division of privately held Thompson Medical. But they experienced such growth and attendant marketing support, with the lines accounting for 48.9% of Thompson's media spending in 1989 and 75.3% in 1990, that Chairman S. Daniel Abraham spun them into an independent though tightly held entity, Slim-Fast Food Co., in early 1991.

Slim-Fast Food's breakaway is going strong in 1991. Ultra Slim-Fast leads the meal replacement category with an estimated 80% of the market. Making Slim-Fast autonomous allowed Thompson to focus on other OTC product lines, its mainstay until a few years ago.

Dexatrim attracted $14.98 million in media in 1990, down 28.4%. It competes head-to-head with Ciba-Geigy Corp.'s Acutrim appetite suppressant.

The company's goal in 1991, says Debra Wolpov, manager-advertising, is to become "a nutrition company, not a diet company." In keeping with that, two new product lines were introduced in April: Ultra Slim-Fast Frozen Delight non-dairy desserts and Ultra Slim-Fast frozen entrees.

In 1990, the unit introduced Ultra Slim-Fast pudding mix and Ultra Slim-Fast Lite 'N Tasty popcorn and cheese curls.

HEADQUARTERS

Thompson Medical Co./222 Lakeview Ave., 17th Floor/West Palm Beach, Fla. 33401-6112/Phone: (407) 820-9900.

PERSONNEL, BRANDS, AGENCIES

THOMPSON MEDICAL CO.: Greg Shaban, sr vp-sales; Alison Mann, brand mgr-Dexatrim/Cortizone-5/Sleepinal; Jennifer Jackson, brand mgr-Tempo/new prods; Richard Schecter, brand mgr-Aspercreme/Sportscreme/Arthritis Hot.

Aspercreme-print media: Grey Advertising, New York. Edee Wollin, vp-mgmt super.

Dexatrim: Saatchi & Saatchi Advertising, New York. Linda Honan, sr vp-mgmt super.

Encare, NP27, Cortizone-5, Sportscreme, Sleepinal, Aqua-Ban, Tempo, Arthritis Hot: Laurence, Charles, Free & Lawson, New York. Robin Coval, exec vp.

SLIM-FAST FOODS CO.: Beth Brenner, pres-sweet goods div/mktg-new Frozen Delights; Irwin Simon, pres-nutritional div; Ronald Stern, pres-grocery div/mktg-new frozen entrees; Greg Schmitz, mktg dir-powder div; Vincent Rumore, vp-snacks div; James Ortiz, mktg dir-beverage div; Tammy Simon, vp-adv; Debra Wolpov, mgr-mktg.

Slim-Fast, Ultra Slim-Fast, Ultra Slim-Fast water-mixable/Ultra Slim-Fast Hot Cocoa meal replacement shakes, Ultra Slim-Fast Nutrition bars, Ultra Slim-Fast Crunch bars, Ultra Slim-Fast Pudding, Ultra Slim-Fast Lite 'N Tasty snacks, Ultra Slim-Fast Frozen Entrees: Grey Advertising, New York. Jeff Stein, exec vp.

RANK: 10

Time Warner

New York

Ad spending: $676.9 million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	67,607	60,099	12.5
Sunday magazine	4,161	3,468	20.0
Newspaper	46,161	43,077	7.2
Outdoor	445	958	(53.5)
Network TV	72,000	47,631	51.2
Spot TV	81,751	90,163	(9.3)
Syndicated TV	27,558	13,277	107.6
Cable TV networks	50,662	37,538	35.0
Network radio	3,129	2,574	21.6
Spot radio	5,247	9,585	(45.3)
Measured media	358,720	308,372	16.3
Unmeasured	318,200	273,600	16.3
Total	676,920	581,972	16.3
By top brands	**1990**	**1989**	**% chg**
Warner Bros. pictures	110,063	95,168	15.7
HBO cable TV network	54,432	38,910	39.9
Time-Life books	45,863	32,680	40.3
Sports Illustrated magazine	26,550	21,499	23.5
Time-Life video	19,505	13,633	43.1
Time-Life records & tapes	14,229	18,383	(22.6)
Warner home video cassettes	9,717	9,746	(0.3)
Time magazine	9,345	676	1,282.8
People magazine	9,109	12,547	(27.4)
Sports Illustrated video	7,195	1,345	435.1

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	11,517	10,779	6.8
Earnings	(227)	(432)	NA
U.S.	**1990**	**1989**	**% chg**
Sales	8,550	6,361	34.4
Operating income	1,035	774	33.7
Division sales	**1990**	**1989**	**% chg**
Publishing	2,926	3,003	(2.6)
Filmed entertainment	2,904	2,760	5.2
Music	2,931	2,545	15.2
Cable TV	1,751	1,543	13.5
Programming-HBO	1,266	1,177	7.6

CORPORATE PROFILE

More than two years after the merger of Time Inc. and Warner Communications, pundits are starting to question whether one plus one equals two after all.

Time Warner's search for strategic partners in overseas markets has been fruitless, and there's little evidence of the much-touted synergies. In July 1991, the company was pressured by shareholders to abandon a controversial rights offering in favor of a more traditional plan.

The failed rights offering turned a harsh spotlight on Time Warner and raised questions about its ability to pay down a crushing $8.9 billion in debt.

The synergies that spurred the creation of Time Warner have been most evident in the magazine publishing area, where Time Inc. Magazine Co. has been aggressively packaging its parent's diverse media resources to sell cross-media programs to marketers like Chrysler Corp., General Motors Corp. and more recently Mazda Motor of America.

The magazine group announced a restructuring of its sales force in June to strengthen its corporate ad sales efforts, putting in place four regional sales executives to whom all sales reps for individual titles now report.

Time Inc. Magazine Co. remained aggressive overall, despite a recession that has severely cut into ad pages at many of its titles. *Time*, *People* and *Sports Illustrated* watched pages fall 20.5%, 13.8% and 16.3%, respectively, the first seven months ended July 1991 compared with the year-earlier period.

The company continued to pour money into *Entertainment Weekly*, which appears to be gaining momentum, and gave a green light to the rollout of *Martha Stewart Living* and related media properties. A weekly version of monthly *Life* was published during the Persian Gulf War.

Sports Illustrated remained the biggest spender of the magazines, shelling out $26.6 million to woo subscribers, up 23.5% from 1989. Virtually all the money was split between cable and spot TV. *People* cut consumer spending 27.4% to $9.1 million.

After a blockbuster 1989 in which it led all studios, Warner Bros. dropped to a fifth-place ranking with a 13% share of the North American film market. It has rebounded somewhat this year on the strength of "Goodfellas," released in fall 1990, and "Robin Hood," the summer's second-biggest box-office hit.

"Presumed Innocent" received the most media support at $9.9 million. The studio also spent heavily to promote "Driving Miss Daisy" ($9.5 million) and "Gremlins 2" ($9.3 million).

Media spending by Time-Life Books rose a whopping 40.3% to $45.9 million, while spending on Book-of-the-Month Clubs dropped 18% to $5.8 million.

HEADQUARTERS

Time Warner/75 Rockefeller Plaza/New York, N.Y. 10019/Phone: (212) 484-8000.

PERSONNEL, BRANDS, AGENCIES

TIME INC. MAGAZINE CO.: Donald M. Elliman, Jr., pres-sales/mktg div; S. Christopher Meigher, pres-New York magazine div; Robert L. Miller, pres-ceo, Time Publishing Ventures; Donald J. Barr, exec vp. *Entertainment Weekly*: Michael J. Klingensmith, publisher; Michael J. Kelly, adv sales dir; Scott L. Kauffman, dir-mktg devel/promo; John Squires, consumer mktg dir; Dan Osheyak, promo dir. *Fortune*: James B. Hayes, publisher; C. Stuart Arnold, adv sales dir; Michael J. Dukmejian, mktg dir; Brian D. Wolfe, consumer mktg dir; David L. Nimz, promo dir. *Life*: Katherine M. Bonniwell, publisher; William P. Kupper Jr., adv sales dir; Mark L. Hintsa, mktg dir; Jeffrey A. Ente, consumer mktg dir; Ripley Odell, promo dir. *Money*: William S. Myers, publisher; Betsy Martin, adv sales dir; Linda McCutcheon Conneally, mktg dir; Michele M. Jaworski, consumer mktg dir; Michael Rich, promo dir. *People*: Ann S. Moore, publisher; Jim Donoghue, adv sales dir; Fred Poust, mktg dir; Jeremy Koch, consumer mktg dir; Hope Hening, promo dir. *Sports Illustrated*: Mark Mulvoy, publisher; Alvaro Saralegui, adv sales dir; Linda Warren, consumer mktg dir. *Sports Illustrated for Kids*: Susan Sachs, publisher; Kathy-Lee Wilcox, sales devel dir; Susan

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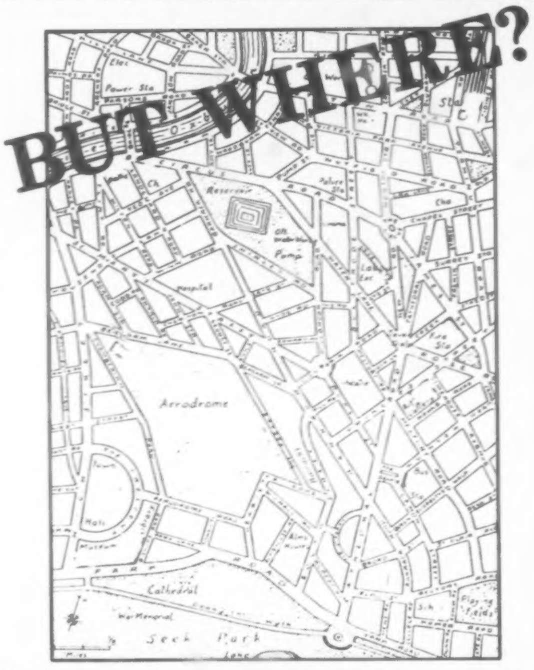

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Alexander, mktg dir; Katharine P. Salovaara Brower, consumer mktg dir; Pamela T. Dey, promo mgr. *Time*: Lisa Valk, publisher; Cleary Simpson, adv sales dir; Mark Stanich, assoc mktg dir; David Gitow, consumer mktg dir; Kelly Knauer, promo dir.

Entertainment Weekly adv promo: Deutsch Direct, New York. Marjorie Spitz, acct exec; Mark Schneider, creative dir.

Fortune adv promo, Sports Illustrated adv promo, Sports Illustrated for Kids adv promo: Ogilvy & Mather, New York. David Warden, exec grp dir.

Life adv promo: Messner Vetere Berger Carey Schmetter, New York. Tom Messner, Ron Berger, partners.

Money adv promo: Mullen Advertising, Wenham, Mass. Bruce Gold, acct super.

People adv promo: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

People consumer mktg: Holland & Callaway Advertising, New York. Ron Holland, chmn.

Sports Illustrated consumer mktg: Wunderman Worldwide, New York. Phil Cheevers, sr vp-mgmt super. A. Eicoff & Co., Chicago. Francie Barson, sr vp-media dir.

Time adv promo: Fallon McElligott, Minneapolis. Robert Van Horn, acct. super.

Consumer mktg promo: Entertainment Weekly, Fortune, Life, Money, People, Sports Illustrated for Kids: In-house. Catherine Heim, creative dir-consumer mktg div, *Fortune, Money, Life, People*; Anil Singh, creative dir-consumer mktg div, *Sports Illustrated for Kids, Time, Entertainment Weekly*.

SUNSET PUBLISHING CORP.: David B. Woodward, vp-mktg dir; James W. Baker, vp-adv sales dir, *Sunset*.

Sunset adv promo: Saatchi & Saatchi Advertising, San Francisco. David Hill, pres-corp comms grp.

SOUTHERN PROGRESS CORP.: James E. DeVira, exec vp-grp publ; Hallet Johnson III, vp-circ dir; Paul Shebs, circ mktg dir. *Cooking Light*: Jeffrey C. Ward, publisher; Rick Emerson, promo mgr. *Progressive Farmer*: Ed Dickinson, publisher; W.L. Stradley, mktg svcs dir; Patti Henderson, sales promo mgr. *Southern Accents*: Anthony P. Glaves, publisher; Eleanor Griffin, creative svcs dir; Allen Vaughan, circ dir. *Southern Living*: Scott Sheppard, assoc publisher; Greg Keyes, adv dir; Eleanor Griffin, creative svcs dir; Pat Van der Meer, circ dir.

FILMED ENTERTAINMENT, WARNER BROS.: Robert G. Friedman, pres-worldwide theatrical adv/pub.

Warner Bros. films: Grey Advertising, New York. Alec Gerster, exec vp-media.

PROGRAMMING & CABLE, TIME WARNER CABLE GRP.: Tim Evard, vp-mktg, American Television and Comms. Corp.; Kevin Leddy, sr vp-mktg, Warner Cable Comms.

ATC Corp.: In-house. James Duffy, dir-pr.

HOME BOX OFFICE: John K. Billock, exec vp-mktg.

HBO: BBDO Worldwide, New York. Ken Angel, sr vp-mgmt rep.

Cinemax: Direct marketing: Kobs & Draft Advertising, New York. Howard Draft, pres.

RANK: 17

Toyota Motor Corp.

Toyota City, Japan

Ad spending: **$580.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	77,924	53,208	46.5
Sunday magazine	2,148	712	201.6
Newspaper	12,536	6,460	94.1
Outdoor	1,275	572	123.0
Network TV	170,903	110,847	54.2
Spot TV	117,589	91,032	29.2
Syndicated TV	16,258	8,616	88.7
Cable TV networks	5,804	3,504	65.6
Network radio	1,013	2,196	(53.8)
Spot radio	1,087	15,200	(92.9)
Measured media	406,538	292,347	39.1
Unmeasured	174,200	125,300	39.0
Total	580,738	417,647	39.0
By top brands	**1990**	**1989**	**% chg**
Toyota cars	212,671	167,613	26.9
Lexus cars	97,886	46,025	112.7
Toyota trucks & vans	89,798	64,344	39.6

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	71,400	60,084	18.8
Earnings	3,100	2,884	7.5

CORPORATE PROFILE

Toyota Motor Sales USA had a second million-plus sales year backed by an advertising budget 39% higher than the previous record high in 1989.

Toyota says it can meet its pre-Persian Gulf War goal of selling 1 million Toyota cars and trucks and 60,000 Lexus cars in 1991.

Toyota sold 994,471 cars and trucks in calendar 1990, plus 63,534 units from its Lexus luxury car division, giving it a total of 1,058,005 units or a 7.2% share of the total U.S. car/truck market, up 1.2 share points.

The popular Camry was the most heavily promoted, with $49 million in media spending, the same as in 1989. Pickup trucks drew $44 million, up 30%.

Media spending for the two Lexus models totaled $97.8 million, up 112.7%. The top-of-the-line LS 400 model got the bulk of spending, $52 million, up 79%.

Lexus in June added the new SC 400 luxury sports coupe, base-priced at $37,500. The launch included 24-page ad inserts in eight publications.

Lexus this fall introduces the ES 300, replacing the ES 250, which made its debut in 1989.

The restyled 1991 Tercel, base-priced at $6,488 for the two-door model, will be featured in several spots on Major League Baseball's World Series.

The Toyota Paseo, an entry-level sporty coupe priced in the $10,000 to $11,000 range, was introduced in mid-1991. TV spots that broke on NBC basketball were flippant and "wise-guy" in approach, a departure from the spots featuring jumping car owners.

Toyota shelved indefinitely its entry into the full-size pickup truck market, the domain of Ford Motor Co. and General Motors Corp.

HEADQUARTERS

Toyota Motor Sales USA/19001 S. Western Ave./Torrance, Calif. 90509/Phone: (213) 618-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Toyota: George Borst, vp-strategic prod planning; Renald T. Rooney, corp mktg mgr; Gerald R. Perry, natl adv mgr; David Pelliccioni, natl merch mgr; Don Cecconi, natl truck adv mgr; Leo Parente, dealer assn adv mgr. Lexus: Donald V. Esmond, corp sales mgr; Robert Neuman, natl mktg mgr; Richard Anderman, natl adv mgr.

Toyota cars & trucks: Saatchi & Saatchi DFS/Pacific, Torrance, Calif. Warren Benjamin, mgmt dir.

Lexus cars: Team One (Saatchi & Saatchi), El Segundo, Calif. Scott Gilbert, exec vp-mgmt dir.

Hispanic adv-Toyota/Lexus: Conill Advertising, Los Angeles. Fabiola Hernandez, vp-client svcs dir.

RANK: 93

UAL Corp.

Elk Grove Village, Ill.

Ad spending: **$123.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	8,613	11,100	(22.4)
Sunday magazine	120	212	(43.4)
Newspaper	18,659	11,604	60.8
Outdoor	5	830	(99.4)
Network TV	40,361	40,566	(0.5)
Spot TV	8,217	9,859	(16.7)
Syndicated TV	148	68	117.3
Cable TV networks	1,649	2,467	(33.2)
Network radio	985	1,631	(39.6)
Spot radio	5,090	8,105	(37.2)
Measured media	83,847	86,441	(3.0)
Unmeasured	39,700	40,900	(2.9)
Total	123,547	127,341	(3.0)
By top brands	**1990**	**1989**	**% chg**
United Airlines	83,760	82,924	1.0

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	11,038	9,794	12.7
Earnings	95	324	(70.8)
Division sales	**1990**	**1989**	**% chg**
Passenger	9,634	8,536	12.9
Cargo	593	521	13.7
Other	811	736	10.1

CORPORATE PROFILE

Buffeted by a soft economy, higher fuel costs and competitors' price cutting, UAL Corp. has seen profits disappear. But by other key measures—amount of service, share and long-term direction—the airline has emerged considerably better.

For the first time in four years, UAL officials' main concerns are marketing and route decisions, not selling the company.

Problems in the junk bond market and settlement of a pilot contract helped end drawn-out sale discussions. But also quieting the drive to sell was the airline's success at expanding service in Asia and also in Europe, where it bought some Pan Am routes last year.

As of August, a third of United's capacity was in international service. The Gulf war and the recession helped lower United's passenger-load factor, which measures the percentage of passenger seats in use, to 64.3% for the first half of 1991 compared with 65.5% a year earlier. In July, with Middle East tensions easing, the company reported a load of 72.7%, up from 71% a year ago.

United's share of domestic-revenue passenger miles through July rose to 18.3% (from 16.6% last year), enough to tie it for the top spot with American Airlines. Delta had 15.2% and will get some share growth from its acquisition of Pan Am (5% share), but so will United, which picked up Pan Am's European routes.

United has positioned itself as the business traveler's carrier, with an extensive Mileage Plus frequent-flier program aimed at wooing business travelers who pay higher fares.

United, like most other carriers, pulled back sharply on advertising during the war and, as a result, will spend less in 1991 than in 1990. However, the addition of services and a new European campaign are expected to sharply stimulate spending next year. Much of the ad focus this year has been new service, but is expected to become less image-oriented under new VP-Marketing Adam Aaron, a former Hyatt executive.

HEADQUARTERS

UAL Corp./1200 Algonquin Rd./Elk Grove Village, Ill. 60007/Phone: (708) 952-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: John C. Pope, vice chmn; Adam Aaron, sr vp-mktg; John E. Ruhaak, vp-adv/promo; William Alenson, sr staff exec—intl adv; Karen Sheriff, staff exec-domestic adv; Patricia Engels, pres—Mileage Plus Inc.; Tom Lagow, sr vp-planning.

United Airlines: Leo Burnett USA, Chicago. James Thompson, sr vp-acct dir.

RANK: 19

Unilever NV

London/Rotterdam

Ad spending: **$568.9 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	70,836	72,964	(2.9)
Sunday magazine	2,290	1,077	112.5
Newspaper	1,101	1,989	(44.6)
Outdoor	716	37	1,846.5
Network TV	162,862	190,394	NA
Spot TV	64,534	60,166	7.3
Syndicated TV	42,155	38,943	8.2
Cable TV networks	6,740	7,444	(9.5)
Network radio	2,858	3,611	(20.8)
Spot radio	1,817	1,479	22.9
Measured media	355,909	378,103	(5.9)
Unmeasured	213,000	226,300	(5.9)
Total	568,909	604,403	(5.9)
By top brands	**1990**	**1989**	**% chg**
Ragu sauces	23,676	15,154	56.2
Wisk laundry detergents	17,825	20,115	(11.4)
Surf detergents	17,690	20,556	(13.9)
Close-up toothpaste	15,957	15,888	0.4
I Can't Believe It's Not Butter	15,114	18,841	(19.8)
Vaseline creams & lotions	14,991	25,259	(40.7)
Promise margarine	13,707	13,549	1.2
Shedds margarine	13,692	11,750	16.5
Lipton tea	12,391	4,735	161.7
Snuggle fabric softener	12,271	17,823	(31.2)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	39,620	33,444	18.5
Earnings	1,634	1,629	0.3
U.S.	**1990**	**1989**	**% chg**
Sales	8,680	8,114	7.0
Operating prodit	498	526	(5.4)
Division sales	**1990**	**1989**	**% chg**
Margarine, edible fats	7,961	7,038	13.1
Frozen foods, ice cream	5,203	4,112	26.5
Food & drinks	6,346	5,499	15.4
Detergents	8,452	7,214	17.2
Personal products	4,725	3,636	30.0
Specialty chemicals	3,080	2,816	9.4
Agribusiness	1,420	1,091	30.2

CORPORATE PROFILE

Strong performances by Lever Bros. and Van den Bergh Foods couldn't counter the surprising downturn at Thomas J. Lipton Inc. as Unilever's U.S. operations dropped 5.4% in operating profit in 1990 compared with the previous year.

Executives from Lipton, generally one of Unilever's strongest operations, blamed a weak economy, increased competition and static markets for the first profit drop in 38 years.

Unilever responded to the lack of growth at Lipton by eliminating 900 jobs, half related to two U.S. factory closings. By the middle of 1991, the company reported the cost-cutting moves had begun to pay off.

Lipton will spend more money introducing new products now that it has a lower cost base, the company said. Twenty-five new products are being prepared for rollout this year.

Lipton in 1990 supported its teas, soups and side dishes with $21.8 million in ad spending, a 41.6% increase. Lipton is the leading tea marketer globally with about a 30% share, and holds 47% in the U.S., according to Kidder, Peabody & Co. analyst Jay H. Freedman.

The company focused its promotional efforts on decaffeinated tea, sun tea, specialty and convenience teas. Lipton side dishes and Wish-Bone salad dressings added several new varieties, including olive-oil dressings to the Wish-Bone line.

Unilever's Van den Bergh Foods, formed by bringing together brands from

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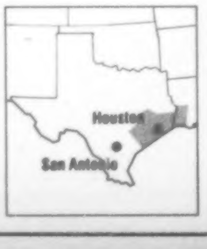

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four separate companies, began expanding beyond margarines into cheeses. Van den Bergh's branded margarine business, including Promise and I Can't Believe It's Not Butter, has grown from a 9% share in 1981 to a leading 36% share of the $1.4 billion category last year, Mr. Freedman said.

Van den Bergh is expected to roll out soon a Promise low-fat, low-cholesterol cheese to compete in the $200 million "light" cheese market.

Ragu Foods is attempting to leverage its strong brand name by introducing Chicken Tonight simmer sauces, the company's first effort beyond spaghetti and pizza sauces. The company holds more than a 50% share of the $1 billion-plus spaghetti sauce market, and last year boosted spending for sauces to $23.6 million, up 56.2%.

Lever Bros. continued to hold its own in household cleaning aids. Following a fall introduction, the company expanded Wisk Power Scoop into more markets this year. Lever is high on the new product. Its own estimates show a 5- to 6-point jump in the company's share of powder detergents following the introduction of Power Scoop last fall.

Lever is promising to invest $55 million in marketing behind Power Scoop to compete in the fast-growing superconcentrate segment of the $3.8 billion detergent category. It also appears to be taking ad dollars from other brands. Spending dropped virtually across the board on Wisk, Surf, Sunlight and All.

Lever in 1990 held 24% of the total detergent market, with Wisk as its biggest brand, with an 8% share. Wisk trailed Procter & Gamble Co.'s Tide powder at 22.5% and Tide liquid at 9%. Surf also had an 8% share, with 5 percentage points for powder and 3 for liquid.

In other major categories, Lever is the No. 2 fabric softener marketer with a 25% share, 20% for Snuggle and 5% for Final Touch. The company spent $12.3 million to support Snuggle last year, down 31.2%.

Lever markets the leading bar soap, Dove, which holds 17.5% of the $1.5 billion category. The company's other brands. including Caress, Lux, Shield and new Lever 2000, bring its total share to more than 27%. The brands dropped a collective 11.7% in media spending to $26.5 million, which included sizable declines in Dove and Caress but a hefty $6.9 million push to introduce new soap, Lever 2000.

Chesebrough-Pond's USA unit added extensions in 1990 to its main brand lines: Close-Up anti-plaque toothpaste and rinse, Vaseline Intensive Care UV Daily Defense lotion, Vaseline Intensive Care sunless tanning lotion, Block Out moisturizing sunblock and Rave All In One haircare products.

No longer a major player in toothpastes, the company's biggest brand is Close-Up with a 7% share. Unilever also has had little impact on the shampoo market, although it markets several brands, and has made few inroads into the U.S. deodorant category despite its leading position worldwide.

In fragrances, Elizabeth Arden Inc. used Elizabeth Taylor this year in introductory advertising for the star's new White Diamonds, which joins Elizabeth Taylor's Passion, introduced in 1987. The company also is working on an Elizabeth Taylor color cosmetics line planned for a 1992 introduction, to be followed by a skincare line. Lagerfeld Photo for men made its debut last fall.

Unilever's Calvin Klein Cosmetics Co. also introduced a new scent this summer, Escape. Calvin Klein is the No. 2 fragrance marketer with about $140 million in U.S. sales, behind Estee Lauder Inc.'s $200 million.

Unilever's media spending for fragrances, including Passion, Calvin Klein's Eternity and Obsession and other Arden products was $36.6 million, down 6.9%.

This May, Lipton realigned its agency roster by assigning Wish-Bone and Lipton side dishes to Ogilvy & Mather from Young & Rubicam and Gold Bond ice creams to McCann-Erickson Worldwide from Grant/Jacoby.

HEADQUARTERS

Unilever NV/P.O. Box 760/3000 DK Rotterdam, The Netherlands.
Unilever PLC/Unilever House/P.O. Box 68/London EC4P 4BQ, U.K.
Unilever U.S./390 Park Ave./New York, N.Y. 10022/Phone: (212) 888-1260.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Joseph E. Campion, dir-media; John Lamson, assoc dir-media mgmt grp; Jean Marine Fish, Noreen Simmons, media mgrs; Irene Grieco, magazine super; Jeannine Heller, spot super; Daniel Riordan, assoc dir-network bdcast grp; Alberta Drumm, bdcast mgr.

LEVER BROS.: David F. Webb, pres; David B. Sharp, sr vp-mktg; Greg Creed, category mgr-bar soap; William J. Genter, category mgr-laundry detergents; Peter Ryan, category mgr-laundry additives; Marc Rovner, category mgr-hard surface cleaners; Keith D. DeVault, sr vp-sales; Robert Schmitz, mktg research dir; Elizabeth C. Crehan, dir-promo svcs; Frank E. Gonda Jr., dir-creative svcs.

All, Snuggle, Shield: Lintas:New York. Irene Little, mgmt super.

Dove, Surf, Final Touch: Ogilvy & Mather, New York. Neve Savage, sr vp-grp dir.

Sunlight, Caress: BBDO Worldwide, New York. Andrew Donchak, exec vp-sr acct dir.

Wisk, Lever 2000: J. Walter Thompson USA, New York. Bill Gross, sr vp-acct dir.

Professional programs, medical: Sudler & Hennessey, New York. Wayne Traub, sr vp.

VAN DEN BERGH FOODS: Consumer Prods. Grp: Natalie M. Danysh, vp-mktg; Rajan W. Nagarkar, category mgr; Lynn Johnson, dir-mktg research; Myrna F. Schreibman, sr promo devel mgr. Professional Mkts. Grp.: Thomas E. Milligan, sr vp; H. Dennis Smith, dir-comms; James E. Kilponen, vp-gm, foodservice; Arto Puolanne, vp-gm, bakery personnel.

Mrs. Butterworth's syrups, Mrs. Butterworth's pancake & waffle mixes: BBDO, New York. Janet Presley, sr vp-mgmt rep.

Promise, I Can't Believe It's Not Butter!: McCann-Erickson Worldwide, New York. Linda Luca, sr vp-mgmt super.

Shedd's Country Crock spreads, Country Crock cheese products, Mrs. Filbert's margarine & salad products: Stone & Simons, Southfield, Mich. Christopher Gaffield, exec vp.

Imperial margarine: Lintas:New York. Stephanie Becker, sr vp-mgmt super.

Foodservice: Esrock Advertising, Orland Park, Ill. Jack Coughlin, pres.

Bakery-frozen doughs, mixes: The Marlin Company, Springfield, Mo. Dennis Marlin, pres.

THOMAS J. LIPTON INC.: Robert A. O. Davidson, sr vp-mktg; Max J. Ballard, sr vp-sales, Gold Bond; John M. Heil, vp-grocery mktg, Lawry's; Richard P. Kundrat, vp-gm, foodservice-bottler & dairy; Angelo S. LaMantia, vp-foods div; Robert S. Livingston, vp-sales div; Richard Newman, vp-mktg, Gold Bond; E. Russell Sherwood, vp-beverage div; Roy Thompson, gm-foodservice, Lawry's; Bruce Belowich, category dir-soups/meals; Michael Cullen, category dir-tea; J. Peter Deeb, dir-merch/promo planning; Linnea Johnson, category dir-convenience beverages/new prods; Tom Keen, dir-new food projects; Stewart Krentzman, category dir-condiments/snacks; Theodore Labiner, dir-adv/consumer svcs; Joseph Russo, dir-mkt research; Joseph Scaccia, Daniel Wynne, dirs-prod mgmt, Lawry's; John L. Sullivan, dir-mktg, foodservice.

Lipton teas, soup mix, Cup-A-Soup: Lintas:New York. Jeffrey Fine, exec vp.

Sunkist fruit snacks, Wyler's drink mixes: FCB/Leber Katz Partners, New York. Jill Seligson, vp-acct dir.

Wish-Bone salad dressing, Lipton side dishes: Ogilvy & Mather. Neve Savage, sr vp-exec grp dir.

Popsicle/Fudgsicle/Creamsicle frozen treats, Mickey's Parade Ice Pops, Mickey Mouse Bars, Gold Bond frozen treats, Minute Maid Fruit Juices, Klondike frozen treats, WWF Superstar: McCann-Erickson Worldwide, New York. Linda Luca, sr vp-mgmt rep.

Lawry's Foods: Dailey & Associates, Los Angeles. Brian Morris, exec vp-dir, client svcs.

Food service: Warner, Bicking, Morris & Partners, New York. J.A. Morris, pres-mktg dir.

RAGU FOODS: Arthur P. Gonis, pres-ceo; Michael Bauer, vp-mktg; John M. Gennari, grp prod mgr-spaghetti sauce; Frances Bainor-Ebner, grp prod mgr-Adolph's/Pizza Quick/Chicken Tonight; Sheryl Roth-Rogers, grp prod mgr-new prods; Robert W. Spassard, vp-sales.

Ragu spaghetti sauces, Pizza Quick sauces, Adolph's tenderizers & marinades, Chicken Tonight: J. Walter Thompson USA, New York. Bruce Kelley, sr vp-mgmt dir.

CHESEBROUGH-POND'S USA: Peter England, sr vp-mktg/sales; William Ecker, dir-mktg, beauty; Gary Fraser, grp prod mgr-oral hygiene; Linda Nash, grp prod mgr-hair care; Steve Walton, grp prod mgr-deodorant/toiletries; Keith Weed, grp prod mgr-skin care; Victor Gaudet, sr vp-sales; William Reynolds, dir-mktg/sales svcs.

Brut deodorant & fragrances, Power Stick deodorant, Aim toothpaste, Pepsodent Professional toothbrush, Impulse body spray, Luna Mystique, Aziza cosmetics, Cutex cosmetics: Lintas:Worldwide, New York. Jeff Fine, grp exec vp.

Vaseline Intensive Care lotion, Vaseline Lip Therapy, Vaseline Intensive Care suncare, Vaseline Intensive Care Hand & Nail Formula lotion, Vaseline Intensive Care UV Daily Defense lotion, Vaseline petroleum jelly, Vaseline Intensive Care bath products, Pond's: McCann-Erickson Worldwide, New York. Audry McConnell, acct super.

Q-tips cotton swabs, Hero, Windsong, Aviance, Verve and Cachet fragrances: Ogilvy & Mather, New York. Linda Cornelius, grp dir.

Close-Up toothpaste, Rave hair care products: J. Walter Thompson USA, New York. Bruce Kelley, mgmt dir.

ELIZABETH ARDEN INC.: Joseph F. Ronchetti, pres-ceo; Joseph X. Spellman, exec vp-mktg devel/creative svcs; Michael Brillhart, exec vp-intl; N. Paul Masturzo, exec vp-gm, Elizabeth Arden U.S.; Bryan H. Janney, vp-gm, Parfums Intl Ltd.; Debra C. McDonough, dir-corp pr/sales promo; Barbara Bank, media dir; Paulette Dufault, vp-adv/creative svcs; James B. Miner, vp-mktg, Elizabeth Arden; Thomas Moloney, vp-mktg, Parfums Intl; Clare A. Cain, vp-mktg devel, fragrance; Victoria Connell, dir-mktg devel, makeup.

In-house.

CALVIN KLEIN COSMETICS CO.: Kimberly Delsing, pres-ceo; Paulanne Mancuso, exec vp; Carmen Dubroc, sr vp-mktg; Lisa Greenblatt, vp-mktg; Linda Doherty, mktg dir-Obsession line; Karen Berkey, mktg mgr-Obsession line; Sarah Williams, intl mktg mgr-Obsession line; Marianne Darlak, mktg dir-Eternity line; Julie Geduldig, mkt coord-Eternity line; Noel Cook-Terwillger, intl mktg mgr-Eternity line; Diana Waldron, sr mktg dir-Escape; Margie Glasser, mktg mgr-Escape; Terry Burstein, intl mktg mgr-Escape; Robert Green, vp-adv; Jeannie Means, adv dir.

Calvin Klein Cosmetics: CRK, New York (in-house). Tonne Goodman, vp-adv. Media buying: Chiat/Day/Mojo, New York. Mary Maroun, mgmt super.

RANK: 68

United Telecommunications

Shawnee Mission, Kan.
Ad spending: **$155.3** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	2,766	4,310	(35.8)
Newspaper	79	830	(90.5)
Outdoor	161	245	(34.3)
Network TV	63,343	41,445	52.8
Spot TV	7,515	8,114	(7.4)
Syndicated TV	5,663	8,060	(29.7)
Cable TV networks	1,478	490	201.3
Network radio	216	0	NA
Spot radio	109	0	NA
Measured media	81,329	63,494	28.1
Unmeasured	74,000	57,800	28.0
Total	155,329	121,294	28.1
By top brands	**1990**	**1989**	**% chg**
US Sprint Communications Co.	67,467	45,737	47.5
US Sprint telephone card	11,194	16,122	(26.1)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	8,345	7,549	10.5
Earnings	309	363	(14.9)
Division sales	**1990**	**1989**	**% chg**
Long distance	5,065	4,324	17.1
Local communications	2,710	2,637	2.8
Complementary, other	807	762	5.9

CORPORATE PROFILE

Although United Telecommunications' US Sprint unit improved its share of the $56 billion long-distance market to about 10% from 8.3%, the year was characterized by an erosion in earnings.

AT&T Co. improved its share to 68% from 66.4% and MCI Communications Corp.'s share jumped to 15% from 12.5%.

Particularly hard hit in the second quarter and again in the third, United Telecom finished the year with net income down 14.9%.

The company blamed competitors' "accelerated sales and marketing efforts." It responded by reducing and realigning its marketing, sales and support functions to focus on residential, small and medium business, major accounts and international segments.

In early 1991, Tom Weigman, former senior partner of Marketing Corp. of America, was hired to the new position of chief marketing officer. Richard Smith, the former top sales and marketing executive, was moved to the new post of senior VP-quality development and PR.

The company's attempt to battle its competitors can't be slighted for a lack of ad spending United Telecom media spending in 1990 jumped 28.1% to $81.3 million, while spending on US Sprint related products surged 38.5% to $79.6 million.

Additional ad dollars have been directed to a series of spots featuring Candice Bergen, who first appeared last October as Sprint's spokeswoman. The initial campaign, which introduced the "Sprint has a better way" theme line, took pot shots at AT&T.

The Big 3 squared off in new product introductions with Sprint and MCI beating AT&T into the marketplace with an 800 number option for residential customers. The two also led the way in the greening of telecommunications, with Sprint launching a March promotion that donated up to 5% of customers' long-distance bills to 25 environmental organizations.

More often than not, Sprint found itself following its competitors in product introductions or in promoting products it already had unveiled. For example, late in 1990 the company created Sprint World, a package focusing on international calling features. But Sprint didn't promote the service until this July—in unique subtitled French-language spots featuring Ms. Bergen—following AT&T's support of its year-old Language Line services.

When MCI broke its Friends and Family 20% discount package last February, Sprint sat on the sidelines. In late May, however, after AT&T also introduced a discount program, Sprint unveiled its Priority frequency discount offer. The package reduced the monthly interstate calling volume needed to receive weekend and daytime discounts.

Sprint also is following its competitors into the market with a twist on their offering $20 cash certificates to customers who switched carriers. Sprint is developing a gift program to reward customer loyalty.

HEADQUARTERS

United Telecommunications/2330 Shawnee Mission Parkway/Westwood, Kan. 66205/Phone: (913) 676-3000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Kathleen Hughes, vp-corp comms.

US SPRINT: Ronald T. LeMay, pres-coo, long distance; Gary D. Forsee, pres-bus svcs grp; Dave R. Schmieg, pres-consumer svcs grp; Paolo L. Guidi, pres-Sprint Intl.; Thomas E. Weigman, chief mktg officer; Jorge L. Rodriguez, vp-adv/mktg comms.

US Sprint: J. Walter Thompson USA, San Francisco. Sherry Paul, sr vp-deputy gm.

US Sprint-dir mktg: Devon Direct Marketing & Advertising, Malvern, Pa. Marianne Croze, vp-mgmt super.

RANK: 99

Upjohn Co.

Kalamazoo, Mich.
Ad spending: **$114.9** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	6,782	9,725	(30.3)
Sunday magazine	651	0	NA
Newspaper	4,215	3,762	12.0
Outdoor	11	0	NA
Network TV	53,894	35,487	51.9
Spot TV	4,212	535	687.1
Syndicated TV	3,807	4,701	(19.0)
Cable TV networks	1,001	955	4.9
Spot radio	84	0	NA
Measured media	74,657	55,164	35.3
Unmeasured	40,200	29,700	35.4
Total	114,857	84,864	35.3
By top brands	**1990**	**1989**	**% chg**
Motrin IB pain reliever	31,084	12,297	152.8
Corporate spending	23,414	27,542	(15.0)
Rogaine hair products	9,348	4,915	90.2
Kaopectate digestive aids	6,413	5,193	23.5

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	3,021	2,725	10.9
Earnings	706	515	37.1
U.S.	**1990**	**1989**	**% chg**
Sales	2,248	2,028	10.8
Earnings	618	377	63.9
Division sales	**1990**	**1989**	**% chg**
Human healthcare	2,406	2,151	11.9
Agricultural	615	574	7.1

CORPORATE PROFILE

Upjohn Co.'s ad expenditures last year were fueled by the prescribed hair treatment, Rogaine, as well as over-the-counter drug Motrin.

Upjohn general promotion advertising, which includes TV spots that refer to reversing male pattern baldness but don't specifically mention Rogaine, increased 17.5% to $27.5 million in 1990. Spending in print, which mentions Rogaine by name, nearly doubled to $9.3 million.

This year, Upjohn appears to have increased its emphasis on broadcast advertising. First-quarter 1991 spending for Upjohn general promotion (largely TV commercials for male pattern baldness) totaled $9.7 million, up 29.3% from a year earlier. Rogaine print advertising fell 33% to $2.2 million.

In addition, FDA approved this August the use of Rogaine as a treatment for female pattern baldness. Promotion should start in early 1992. The company estimates that more than 20 million American women have hair loss vs. about 30 million men.

Motrin IB pain reliever, introduced in 1989, has grown from a 2% share of the ibuprofen segment to 11% last year, said Julie Wolfe of Kline & Co. Although the segment grew 4%, the two leading brands lost ground. Category leader Advil, marketed by American Home Products Corp., dropped to 49% from 53% while Bristol-Myers Squibb Co.'s Nuprin fell to 18% from 20%, Ms. Wolfe said.

Total national ad spending by media

	100 Leading National Advertisers					All U.S. advertising expenditures						
	Advertising expenditures			% of total		Advertising expenditures			% of total		Coen's U.S. estimates*	
Category	**1990**	**1989**	**% chg**	**1990**	**1989**	**1990**	**1989**	**% chg**	**1990**	**1989**	**1990**	**1989**
Magazine	$2,882.1	$2,887.7	(0.2)	8.1	8.6	$6,737.7	$6,595.0	2.2	16.4	16.8	$6,803.0	$6,716.0
Sunday magazine	247.3	235.5	5.0	0.7	0.7	777.1	737.0	5.4	1.9	1.9	NA	NA
Newspaper	2,009.5	1,975.2	1.7	5.6	5.9	8,901.9	8,777.4	1.4	21.6	22.4	32,281.0	32,368.0
Outdoor	267.0	242.7	10.0	0.7	0.7	688.8	705.8	(2.4)	1.7	1.8	1,084.0	1,111.0
Network TV	7,846.8	7,286.0	7.7	22.0	21.6	10,132.3	9,559.0	6.0	24.6	24.4	9,383.0	9,110.0
Spot TV	3,938.7	3,575.2	10.2	11.1	10.6	9,293.3	9,029.4	2.9	22.6	23.0	15,644.0	14,966.0
Syndicated TV	1,258.5	973.5	29.3	3.5	2.9	1,587.6	1,286.7	23.4	3.9	3.3	1,589.0	1,288.0
Cable TV networks	633.9	527.1	20.3	1.8	1.6	1,110.2	952.5	16.6	2.7	2.4	1,393.0	1,197.0
Network radio	417.4	422.1	(1.1)	1.2	1.3	766.4	696.2	10.1	1.9	1.8	482.0	476.0
Spot radio	391.5	687.3	(43.0)	1.1	2.0	1,143.3	898.7	27.2	2.8	2.3	8,244.0	7,847.0
Subtotal measured media	19,892.8	18,812.3	5.7	55.9	55.8	41,138.6	39,237.7	4.8	32.0	31.7	76,903.0	75,079.0
All other advertising	15,720.9	14,907.7	5.5	44.1	44.2	87,501.4	84,692.3	3.3	68.0	68.3	51,737.0	48,851.0
Total U.S. ad spending	35,613.7	33,720.0	5.6	100.0	100.0	128,640.0	123,930.0	4.8	100.0	100.0	128,640.0	123,930.0

Note: Dollars are in millions. Sources: LNA/Arbitron and Radio Expenditure Reports. * Total U.S. advertising volume as estimated by Robert J. Coen, McCann-Erickson (AA, May 6, 1991). See "Methodology and sources," Page 72 for more information.

AA chart: Kevin Brown

Last year Upjohn sold the rights to 17 of its minor consumer brands, leaving Motrin IB, Kaopectate diarrhea medicine and Cortaid antibiotic as its main consumer products.

Ad support for the latter two products grew by double digits; Cortaid expenditures rose 11.9% to $4.8 million, and Kaopectate support increased 24% to $6.4 million.

As part of a management reorganization in late 1990, William U. Parfet was named president. Analysts said his promotion from exec VP reflects the company's desire to remain independent, amid speculation that Upjohn was a candidate for a takeover or merger. Mr. Parfet is the great-grandson of company founder W.E. Upjohn. The founding family controls 18% of Upjohn's stock. Outgoing President Theodore Cooper remains chairman-ceo. He was the first from outside the family to run the company.

Fueling this speculation is the trend toward consolidation in the pharmaceutical industry in recent years, and the predicted pressures on Upjohn's future profits.

Upjohn in 1993 will lose patent protection on two drugs—Xanax, a tranquilizer, and Halcion, a sleeping pill. Together, they bring in 30% of Upjohn's profits and about 15% of sales (nearly $500 million in revenue), according to analysts.

Accordingly, Upjohn's research has been on the pharmaceutical side where it has concentrated on cancer and infectious diseases, cardiovascular ailments, and disorders of the central nervous system.

HEADQUARTERS

The Upjohn Co./7000 Portage Rd./Kalamazoo, Mich. 49001/Phone: (616) 323-4000.

PERSONNEL, BRANDS, AGENCIES

UPJOHN HEALTHCARE: Thomas M. Laughlin, corp vp-gm, consumer prods div; Peter R. Seaver, corp vp-worldwide pharmaceutical mktg; Edward J. Hessler, PhD, corp vp-gm, chemical div; Thomas G. Schalk, DVM, corp vp-worldwide animal health; Richard J. Howland, vp-consumer prods div; George A. Kaufmann, vp-worldwide pharmaceutical mktg; Keith S. [illegible]rton, vp-dermatology div; Sharad L. Ja[illegible]ala, vp-chemical div mktg.

Motrin IB: Hill, Holliday, Connors, Cosmopoulos, New York. Bob Horne, sr vp-grp acct dir.

Kaopectate, Cortaid: Grey Advertising, New York. Laird Stiefvater, acct super.

Rogaine: Klemtner Advertising, New York. David Liebeskind, acct exec.

Hispanic consumer adv: Sanchez & Levitan, Miami. Aida Levitan, exec vp.

RANK: 61

U.S. dairy farmers

Arlington, Va.

Ad spending: **$175.9** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	14,780	16,109	(8.3)
Sunday magazine	0	379	NA
Newspaper	175	141	23.9
Outdoor	1,307	1,715	(23.8)
Network TV	28,742	38,251	(24.9)
Spot TV	32,155	22,519	42.8
Syndicated TV	5,431	4,083	33.0
Cable TV networks	6,510	6,528	(0.3)
Network radio	3,285	5,175	(36.5)
Spot radio	2,603	4,038	(35.5)
Measured media	94,990	98,938	(4.0)
Unmeasured	80,900	84,200	(3.9)
Total	175,890	183,138	(4.0)
By top brands	**1990**	**1989**	**% chg**
National Dairy Prod. & Rsch Board	54,900	58,900	(6.8)
American Dairy Assn	48,000	48,[illegible]	(1.6)

CORPORATE PROFILE

Ad spending in 1990 by U.S. dairy marketing groups was mostly flat, with regional and national dairy groups, particularly milk marketers, trying to stretch funding to stop the decline in consumption levels.

The milk industry had hoped to get a $110 million ad boost this year as part of the federal farm bill, but those hopes are fading.

The bill, passed by Congress in fall 1990, would fund new milk advertising through a 20¢ fee per hunderweight paid by processors, who buy milk from dairy farmers and package it for sale. A new group, the National Processor Advertising & Promotions Board, would administer the funds.

But before the bill can become law, the processors must approve the measure in a referendum. At its October board meeting, the Milk Industry Foundation, representing 80% of processors, will decide if a referendum is to be held. The bill appears to lack the support needed to pass, according to a foundation poll. Half the processors must approve the assessment.

Under the 1983 Dairy & Tobacco Adjustment Act, the amount of money available for dairy advertising is determined by raw milk volume. Dairy farmers and co-ops pay a 15¢ per hundredweight of raw milk assessment.

The National Dairy Production & Research Board receives the largest portion. The board got $77.5 million in funding for 1990, up 2.9%, and spent $54.9 million in media, down 6.8%. The biggest campaign is cheese at $21 million, followed by milk at $16 million.

The economy isn't helping the dairy industry. The board expects flat dairy sales again in 1991, anticipating a weaker foodservice market.

Consumption in some areas seems to be gradually on the upswing. In the milk categories covered by the board, children ages 6 to 16, consumption rose 2% last year.

Dairy marketers are seeing continued success with low-fat products. They are trying to position products such as cheese as part of a quality diet. The NDPRB is conducting a study to match market segments with milk types.

The California Milk Advisory Board is having success with a new milk introduced last year, Extra Light 1%, which has only 1% butterfat but a high calcium level of 11%. It is gaining market share over other low-fat milks and has driven milk sales up 5%. The board's media spending was flat at $18.5 million.

The biggest of the sister bodies to the national dairy board, the American Dairy Association, kept spending flat at $48 million.

Other regional board spending was down or flat. The Wisconsin Milk Marketing Board cut spending from about $11 million to only $546,0[illegible]0 in 1990 as it funneled more monies into research. The Washington Dairy Products Commission spent $3.7 million, even with 1989, and Oregon Dairy Products Commission spending remained at $900,000.

HEADQUARTERS

U.S. Dairy Farmers National Dairy Promotion and Research Board/2111 Wilson Blvd., Ste. 6000/Arlington Va. 22201/Phone: (703) 528-4800.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Cynthia Carson, ceo; George DeJager, sr vp-mktg/adv; Kathryn M. Klaus, dir-adv programs; Maureen Bergen, dir-adv/research programs; Bill Diggins, sr vp-mkt/economic research; Cathy Perpetua, dir-mkt research; Charles Timpko, Paige Patterson, mgrs-consumer research.

Adv to health professionals: Bozell Health Care, New York. Anne Petz, vp acct super.

Consumer & foodservice adv: cheese, butter, ice cream: Grey Advertising, New York. Jordan Rosuck, exec vp.

Nonfat dry milk, trade adv: Gorman Publishing Co., Chicago. Steve Siakis, acct mgr.

Calcium, milk-youth adv: McCann-Erickson, San Francisco. Tom Drese, sr vp.

Food processing & manufacturing: Stricevic & O'Connell, Chicago. Daniel O'Connell, Daniel Stricevic, principals.

HEADQUARTERS

American Dairy Association/6300 N. River Rd./Rosemont, Ill. 60018/Phone: (312) 696-1880.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: M.F. Brink, ceo; Gerald A. McCann, sr vp-adv; Christopher W. Clay, vp-mktg srvcs; Steven A. Dohrmann, vp-mktg planning; Donna A. Arcus, dir-retail promo; Debra L. Olson, dir-foodservice/special mkts promo.

Fluid milk, REAL seal, cheese, butter, other dairy foods: D'Arcy Masius Benton & Bowles, Chicago. Ben Bishop, sr vp-grp acct dir.

Foodservice: Noble & Associates, Chicago. Susan Saltwell, vp-foodservice.

HEADQUARTERS

California Milk Advisory Board/400 Oyster Point Blvd., Ste. 214/South San Francisco, Calif. 94080/Phone: (209) 521-1060.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: [illegible] Watts, ceo; Adri Boudewyn, dir-comm[illegible].

Manufactured dairy products: Foote, Cone & Belding, Los Angeles. Harry Lamdseidel, mgmt dir.

Fluid Milk: McCann-Erickson Worldwide, San Francisco. Michael Freeman, acct exec.

HEADQUARTERS

Oregon Dairy Products Commission/10505 S.W. Barbur Blvd./Portland, Ore. 97219/Phone: (503) 229-5033.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Sheldon Pratt, ceo; Lorinda M[illegible]lt, dir comms.

Cheese, fluid milk: In-house.

HEADQUARTERS

Washington Dairy Products Commission/1107 N.E. 45th Street/Seattle, Wash. 98105/Phone: (206) 545-6763.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Rod Erickson, ceo; Steve Matzen, dir-mktg; Doug Simpson, gm.

Dairy products: Ehrig & Associates, Seattle. Dick Ehrig, acct super.

HEADQUARTERS

Wisconsin Milk Marketing Board/4337 W. Beltway Hwy./Madison, Wis. 53711/Phone: (6[illegible]) 836-88[illegible].

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ric Johnson, sr vp mktg; Bill Drew, vp prod mgmt; Andrea Hen, vp mkt svcs; Dave Baulnka, mgr-fluid/related prods mktg; Tom O'Connell, mgr-foodservice mktg; Ann Noppe, mgr-food processing mktg; [illegible]ky Jones, mgr-adv/promo.

Cheese: Foote, Cone & Belding, Chicago. Jean MacLaren, mgmt super.

Fluid milk: McCann-Erickson Worldwide, San Francisco. Jerry Scott, acct super.

Food processing: Kocs Wesson & Associates, Milwaukee. Warren Eulgin, mgmt super.

Dairy product promos: Stephen & Brady, Madison, Wis. Katherine Johnson-Becklin, mgmt super-consumer/foodservice promo.

RANK: 39

U.S. Government

Washington

Ad spending: **$304.0** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	39,143	38,204	2.5
Sunday magazine	11,338	5,038	125.1
Newspaper	15,714	16,820	(6.6)
Outdoor	903	1,170	(22.8)
Network TV	53,476	62,109	(13.9)
Spot TV	25,242	[illegible]	(8.1)
Syndicated TV	5,132	6,656	(22.9)
Cable TV networks	5,900	5,971	(1.2)
Network radio	15,281	14,855	2.9
Spot radio	9,016	6,473	39.3
Measured media	181,145	184,755	(2.0)
Unmeasured	122,900	125,400	(2.0)
Total	304,045	310,155	(2.0)
By top brands	**1990**	**1989**	**% chg**
U.S. Army	62,591	61,809	1.3
U.S. Postal Service	42,519	46,536	(8.6)
U.S. Navy	14,695	10,572	39.0
U.S. armed forces	14,692	23,297	(36.9)
U.S. government departments	7,026	1,325	430.1

CORPORATE PROFILE

The federal budget may be continuing to grow, but such is not the case with the amount of federal funds allocated to advertising. Whether military or civilian, virtually every account is looking at stiffer cuts, with some expected to decline sharply in fiscal 1991, ending Sept. 30.

The U.S. Navy recruiting account, for example, grew 29.4% from fiscal 1989 to fiscal 1990, to $25.1 million, but is expected to shrink 35.5%, to $16.2 million, in 1991.

Likewise for the U.S. Marine Corps account. After a slight decline from fiscal 1989 to 1990, $17.8 million to $17.1 million, the account that's been held by J. Walter Thompson USA since 1946 is slated to shrink to $10.1 million for fiscal 1991.

One caveat for the scheduled budget changes that could alter some of the expected numbers for fiscal 1991 is the Persian Gulf War.

The U.S. Postal Service, a quasi-government agency, also saw considerable decline in advertising. That's all the more noteworthy since the postal service is a major sponsor of the 1992 Olympics; the agency is just gearing up for its Olympics-related campaign, but nevertheless was coming off a budget cut of about 14% from fiscal 1989 to fiscal 1990's $31.6 million.

The joint military recruiting account, once targeted for considerable expansion at the expense of individual service accounts, is another shrinking account. Down 2.6% in 1989 to $26.3 million, the joint recruiting account fell to $11.7 in fiscal 1990.

The National Railroad Passenger Corp (Amtrak) spent $25.5 million in media, down 5.4% from the prior year.

HEADQUARTERS

U.S. Government/Washington.

PERSONNEL, BRANDS, AGENCIES

DEPARTMENT OF DEFENSE: Lt. Gen. Mentor Alexander, deputy asst secretary-defense, military manpower & personnel policy; Lt. Col. Martha Cavaiani, USA, acting dir; Lt. Col. Dave Fred-

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rikson, USA, asst dir-adv, contracting officer's rep; Lt. Porsche Gaston, USMC, program adv mgr; Capt. Donna Edwards, USAF, program adv mgr; Lt. Steve Hein, USCG, program adv mgr.

Joint Recruiting: Grey Advertising, New York. Robert Ravitz, exec vp-mgmt rep.

DEPARTMENT OF THE ARMY: Honorable G. Kim Wincup, asst secretary-Army manpower & reserve affairs; Lt. Gen. William H. Reno, deputy chief of staff-personnel; Lt. Col. Gregory T. McGuckin, chief-mktg/adv, office of deputy chief of staff-personnel; Maj. Michael I. Roddin, adv program mgr. U.S. ARMY RECRUITING COMMAND: Maj. Gen. Jack C. Wheeler, commanding genl-U.S. Army Recruiting Command; Col. John C. Myers, dir-adv/sales promo/public affairs; Thomas Evans, deputy dir-adv/sales promo/public affairs. U.S. ARMY RESERVE: Maj. Gen. Sandler, chief-U.S. Army Reserve; Joseph G. Hanely, dir-public affairs & adv, office of chief-Army Reserve; Albert W. Schilf, deputy dir-public affairs & adv office. U.S. ARMY ROTC CADET COMMAND: Maj. Gen. Wallace C. Arnold, commanding genl-U.S. Army ROTC Cadet Command; Col. Robert R. Thompson, dir-mktg/adv/public affairs directorate; Lt. Col. John B. Gately, deputy dir-chief, adv branch.

U.S. Army, Army Reserve, Army ROTC: Young & Rubicam, New York. John Glorieux, exec vp-mg dir.

U.S. NAVY: Capt. H.J. Zinser, dir-recruiting, adv dept; Stephen Abbott, dir-adv operations div.

BBDO, New York. Bruce Meyers, exec vp-dir acct svcs.

U.S. MARINE CORP.: Brig. Gen. Charles C. Krulak, dir-personnel mgmt/procurement divs; Lt. Col. Robert E. Wilson Jr., head-mtkg branch.

J. Walter Thompson USA, Atlanta. Chris Hall, sr vp-grp acct dir.

U.S. AIR FORCE: Brig. Gen. Michael G. Vergamini, commander-USAF recruiting svcs; Col. Charles G. Tucker, dir-adv/promo; Tim Talbert, chief-adv div; Albert Rodriguez, chief-mgmt div.

Bozell, New York. Doug Laughlin, vp-mgmt rep.

NATIONAL GUARD: Lt. Col. John Runner, chief-Army National Guard recruiting & retention mgmt center; Maj. Jeanne Werts, Air National Guard recruiting & retention branch.

Bozell, Washington. Doug Laughlin, vp-mgmt rep.

TRANSPORTATION DEPARTMENT-COAST GUARD: Capt. Juan Salas, chief-recruiting & job entry div; Lt. Cmmdr Steve Hein, dir natl adv.

Grey Direct, New York. Alex Eaton, acct super.

U.S. POSTAL SERVICE: Dick Stasser, sr asst postmaster genl-mktg & customs svcs grp; John Wargo, asst postmaster genl-adv & acct svcs; Rod DeVar, dir-adv & promo.

Young & Rubicam, New York. Richard Kahn, sr vp-grp dir.

AMTRAK: William S. Norman, exec vp; Robert Gall, vp-passenger mktg sales; Joan E. Wheatley, dir adv/sales promo.

DDB Needham Worldwide, New York. Roy Lancaster, exec vp-bus unit dir.

U.S. MINT: Dave Pickens, assoc dir-mktg; Mrs. Michael Burke, mktg officer.

American Eagle Coin, Eisenhower Coin: Grey Advertising, New York. Robert Ravitz, exec vp-mgmt rep.

RANK: 95

U.S. Shoe Corp.

Cincinnati

Ad spending: **$120.7 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	6,881	5,944	15.8
Sunday magazine	1,004	700	43.5
Newspaper	2,815	3,144	(10.5)
Outdoor	233	185	26.1
Network TV	9,196	4,868	88.9
Spot TV	34,747	30,466	14.1
Syndicated TV	4	36	(90.0)
Cable TV networks	870	83	NA
Spot radio	616	1	NA
Measured media	56,364	45,427	24.1
Unmeasured	64,300	51,800	24.1
Total	120,664	97,227	24.1
By top brands	**1990**	**1989**	**% chg**
Lens Crafters opticians	37,654	33,735	11.6
Easy Spirit sporting footwear	11,572	3,832	201.9

SALES & EARNINGS ($ in millions)

Worldwide	1991	1990	% chg
Sales	2,719	2,557	6.3
Earnings	433	487	(11.1)
Division sales	**1991**	**1990**	**% chg**
Women's apparel	1,336	1,235	8.2
LensCrafters Optical	580	532	9.1
Footwear	803	791	1.5

CORPORATE PROFILE

U.S. Shoe initiated a restructuring plan in 1990 to streamline operations and increase productivity as it boosted ad spending across the board among its major units.

Restructuring included the sale of 21-store Cabaret accessories retail division, agreements to sell 134 Ups 'N Downs women's apparel stores, closing of two footwear manufacturing plants, termination of the Adrienne Vittadini footwear licensing agreement and merger of Amalfi and David Evins footwear divisions.

The restructuring affected operations accounting for about $330 million in sales, or 12% of total company revenues and $25 million in operating losses in fiscal 1990, which closed Feb. 2, 1991. U.S. Shoe's new president-ceo, Bannus B. Hudson, led the restructuring. He replaced Philip G. Barach, who retired in 1990.

U.S. Shoe's biggest unit, the women's apparel retailing group, recorded an operating loss of $4.9 million, down from a $53.2 million gain in 1989. The loss included a charge of $56 million related to the restructuring. Earnings were down at the group's largest unit, Casual Corner, and also at Ups 'N Downs, Caren Charles and T.H. Mandy.

The weak Christmas selling season affected returns. The company shouldered a decline in gross profits of 8.6% in the soft fourth quarter.

Other retail group units, Petite Sophisticate and August Max, had improved sales and earnings.

Media spending in support of the specialty retailers increased 31.4% though remained at a modest $2.05 million, with Casual Corner claiming $1.5 million of that. Casual Corner is refocusing its merchandise mix, adding more sportswear and casual items to its career line. The chain this month launched a new campaign with the tagline "Work hard, play hard, shop easy." Advertising to Women which won agency-of-record status this year, handles.

Strong first-half 1990 sales in the footwear group compensated for a second-half decrease as the full year achieved 2% growth, as the group reported an operating loss of $13.9 million (including a restructuring charge of $34 million) compared with a $30 million gain in 1989.

Media spending for the group was up 53.8% to $16 million. With hopes of improving product awareness, Easy Spirit shoes and sporting footwear boosted its ad spending to $12.4 million, up from $4.9 million.

An Easy Spirit men's line was launched regionally this year and will go national by the fall of 1992.

LensCrafters has cornered one-third of the eyewear superstore market, which makes up 10% of the $10 billion U.S. retail eyewear market.

A 9% sales increase by LensCrafters is attributed primarily to the opening of 92 new retail outlets; comparable-store sales declined 2%. Operating earnings fell 72% in 1990 to $13.3 million, primarily due to costs of opening 58 stores in the second half of the year. It accounted for two-thirds of U.S. Shoe's media dollars.

HEADQUARTERS

U.S. Shoe Corp./One Eastwood Dr./Cincinnati, Ohio 45227/Phone: (513) 527-7000.

PERSONNEL, BRANDS, AGENCIES

FOOTWEAR MANUFACTURING/WHOLESALING & RETAILING GROUPS: Claire Brinker, mktg dir-Easy Spirit; Jeanie Messer, mktg/sales promo dir-Cobbie Shoes; Ellen Harris, mktg/adv dir-Selby Shoes; Sue Blaney, adv/sales dir-Joyce Shoes; Melissa Swett, mktg dir-corp concept stores.

Easy Spirit shoes: Advertising to Women, New York. Bill Dreher, acct exec. Media: Media that Works, Cincinnati.

Selby Shoes: Creative: In-house. Media: Customized Media, New York. Geri Powers.

Amalfi/David Evins (under license), Bandolino, Capezio, Cobbie, El Dorado, Evan-Picone (under license), J. Chisholm, Joyce, Leslie Fay (under license), Pappagallo, Texas Brand Boots, Vittorio Ricci Studio, Wrangler (under license): Creative: In-house. Media: Media that Works, Cincinnati.

Retailing: Banister/Capezio Factory Direct, The Cobbie Shop, Cincinnati Shoe Company, Easy Spirit Shoe Stores, Hahn Shoes, Joyce-Selby Shoes, Shop for Pappagallo: Creative: In-house. Media: Media that Works, Cincinnati.

LENSCRAFTERS OPTICAL: Kerry Bradley, mktg dir.

Creative: In-house. Media: Media that Works, Cincinnati.

WOMEN'S APPAREL RETAILING GROUP: Greg Lechner, mktg dir-August Max Woman/Caren Charles/Casual Corner/Ups 'N Downs; John Disa, vp-mktg, Petite Sophisticates; Susan Yorkunas, adv mgr, T.H. Mandy.

Casual Corner-creative & media: Advertising to Women, New York. Carl Maier, sr vp.

August Max Woman, Caren Charles, Ups 'N Downs, T.H. Mandy: Creative: In-house. Media: Media that Works, Cincinnati.

RANK: 79

Volkswagen AG

Troy, Mich.

Ad spending: **$138.5 million**

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	10,847	20,830	(47.9)
Sunday magazine	992	164	NA
Newspaper	4,275	6,595	(35.2)
Outdoor	146	33	345.0
Network TV	18,565	21,727	(14.6)
Spot TV	17,506	21,915	(20.1)
Syndicated TV	342	1,117	(69.4)
Cable TV networks	7,730	4,391	76.0

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*ABC Supplemental Data Report, 1990.

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Network radio	31,504	8,300	279.6
Spot radio	5,005	7,251	(31.0)
Measured media	96,912	92,322	5.0
Unmeasured	41,600	39,600	5.1
Total	138,512	131,922	5.0
By top brands	**1990**	**1989**	**% chg**
Volkswagen cars	63,414	52,632	20.5
Audi car leasing	18,456	9,427	95.8
Audi cars	12,718	22,756	(44.1)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	41,817	34,823	20.1
Earnings	667	553	20.6
U.S.	**1990**	**1989**	**% chg**
Sales	2,531	2,283	10.9
Operating income	NA	NA	NA

CORPORATE PROFILE

Volkswagen, with more consecutive yearly declines in U.S. sales than the number of syllables in *Fahrvergnugen*, is embarking on an eight-year, $38 billion worldwide spending program to firm up its shaky market position.

VW, which continues to build its U.S. advertising around the *Fahrvergnugen* ("joy of driving") theme, sold 157,454 VWs and upscale Audis in the U.S. in 1990, up 1.6%. It still posted a 3.8% decline in U.S. revenue in marks, largely due to dealer incentive programs and price cutting. VW has strung together six consecutive years of U.S. revenue declines: all in marks. (Each mark was worth 15.3% more dollars in 1990 than '89, delivering a growth in dollars.)

VW/Audi's total share of the U.S. car market rose slightly to 1.63% from 1.57%, while its share of the import market climbed to 5.3% from 4.8%.

VW has commited more than $20 billion in new investments, including the 1991 purchase of a majority share in Skoda, the Czechoslovak auto marketer. VW plans to spend $1 billion expanding its Puebla, Mexico, plant to supply North America with Golfs and Jettas. VW reached an agreement with Toyota Motor Corp. in July 1991 that paved the way for Toyota dealerships in Japan to begin selling Volkswagens and Audis. The deal could push VW sales in Japan to 100,000 units annually by 1996, compared with 53,461 last year.

For the U.S. market, VW plans a spring 1992 launch of the front-wheel-drive Eurovan, successor to the Vanagon. New editions of Golf and Jetta also are planned. A two-seat speedster to compete with Mazda Motor of America's Miata is in development.

VW's key U.S. marketing strategy in 1990 continued to be forsaking customer rebates in favor of price cuts and dealer incentives. Instead of rebates to raise consumer awareness in 1990, VW banked on its *Fahrvergnugen* campaign.

The sporty new Passat drew the largest media expenditure for a nameplate with $38 million in media in its first year.

This May, VW introduced a credit card program, Club Fahrvergnugen, that had been running in Europe since late 1990. The Visa card program for VW/Audi owners offers cardholders discounts with Carnival Cruise Lines, Northwest Airlines, Holiday Inn and Sony Corp.

Audi saw its U.S. sales drop 0.8% to 21,106 units. A new 10% luxury tax on cars priced above $30,000 slowed sales in first-half 1991.

Audi plans to revamp virtually its entire U.S. line in the 1992 model year. The new models will occupy price gaps between Japanese luxury models and the pricier European luxury cars. Audi has been trying to reposition itself by instituting extensive warranties, advertising stressing driver control and safety, and innovative leasing programs.

HEADQUARTERS

Volkswagenwerk AG/D-3180 Wolfsburg 1, Germany.

Volkswagen of America/3800 Hamlin Road/Auburn Hills, Mich. 48326/ Phone: (313) 340-5000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Ben Hilverda, dir-Audi mktg; Ronald Dusenberry, mgr-Volkswagen adv.

Audi, Volkswagen: DDB Needham Worldwide, Troy, Mich. Peter Saad, exec vp-office of the pres-acct dir.

RANK: 70

Wal-Mart Stores

Bentonville, Ark.

Ad spending: **$151.7** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	3,597	5,226	(31.2)
Sunday magazine	11,722	7,355	59.4
Newspaper	3,221	2,943	9.5
Outdoor	184	98	89.1
Network TV	2,505	227	NA
Spot TV	39,408	34,707	13.5
Cable TV networks	639	672	(4.9)
Spot radio	60	125	(52.0)
Measured media	61,336	51,352	19.4
Unmeasured	90,400	75,700	19.4
Total	151,736	127,052	19.4
By top brands	**1990**	**1989**	**% chg**
Wal-Mart general	30,202	21,864	38.1
Wal-Mart apparel	10,957	8,683	26.2
Wal-Mart sport, toy, hobby	5,826	7,361	(20.8)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	32,602	25,811	26.3
Earnings	1,291	1,076	20.0

CORPORATE PROFILE

Wal-Mart Stores snubbed its nose at a recession that caught most retailers in a vise and leapfrogged over Kmart Corp. and Sears, Roebuck & Co. in total sales to become the nation's biggest retailer.

Wal-Mart also spent considerably fewer ad dollars than its chief rivals in calender '90. Most of its advertising is vendor-funded through co-op deals, which holds down expenses.

The retailer isn't expected to slow its pace, either. It plans to be a $125 billion company by the year 2000. Wal-Mart has 1,600 Wal-Mart stores, 181 Sam's Clubs, and four Hypermart USA units in a 36-state trade area, and is aggressively moving into the Northeast and California. It's expanding in Mexico through a joint venture with Cifra to open about five Club Aurrera membership warehouse stores this year in Mexico City. Cifra is Mexico's largest retailer.

Wal-Mart is testing a close-out store concept with four Bud's Warehouse Outlets. And in a move to further expand its customer base, it broke its first TV advertising aimed at U.S. Hispanics last April, via GSD&M.

Despite the recession, Wal-Mart's same-store sales grew by 11% in the first six months of its current fiscal year. Overall sales, enhanced by new-store growth, have expanded 29%. In fiscal 1990, Wal-Mart posted a 26% increase in total sales, as same-store sales grew 10%.

Part of Wal-Mart's strength is its everyday low-price strategy adopted in the 1960s. GSD&M and Bernstein-Rein handle Wal-Mart's advertising that bears the theme: "Always the low price on the brands you trust—Always."

Wal-Mart's cause-related marketing efforts also score points with [illegible]. Wal-Mart uses green shelf tags in its stores to promote environmental improvements to products and packaging, and has set up recycling centers at its stores. TV advertising from GSD&M supports.

The retailer also remains committed to buying U.S.-made goods. Advertising supports from Bernstein-Rein.

Wal-Mart concentrated most of its measured spending on spot TV in 1990, which amounted to 64% of total media expenditures. Most of Wal-Mart's unmeasured spending is on monthly circulars prepared by its in-house ad department, which also handles newspaper run-of-press advertising.

HEADQUARTERS

Wal-Mart Stores/702 S.W. Eighth Street/Bentonville, Ark. 72716/Phone: (501) 273-4000.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Paul Higham, vp-mktg; Barbara Brown, dir-ad control; Mike Baron, dir-prodn; Bob McCurry, dir-store design; Jim Scibetta, dir-package design.

Wal-Mart Stores: Bernstein-Rein Advertising, Kansas City, Mo. Skip Rein, exec vp. GSD&M, Austin, Texas. Betsy Martin, acct exec.

RANK: 15

Warner-Lambert Co.

Morris Plains, N.J.

Ad spending: **$630.8** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	21,646	26,951	(19.7)
Sunday magazine	28	2,020	(98.6)
Newspaper	269	1,300	(79.3)
Outdoor	995	1,639	(39.3)
Network TV	91,115	100,826	(9.6)
Spot TV	36,696	24,282	51.1
Syndicated TV	48,434	24,745	95.7
Cable TV networks	4,730	3,885	21.7
Network radio	11,582	14,339	(19.2)
Spot radio	233	1,042	(77.6)
Measured media	215,738	201,049	7.3
Unmeasured	415,100	386,800	7.3
Total	630,838	587,849	7.3
By top brands	**1990**	**1989**	**% chg**
Benadryl allergy relief pdts.	26,954	22,372	20.5
Listerine mouthwash	20,328	20,404	(0.4)
Trident gum & mints	20,048	15,721	27.5
Certs mints	18,236	16,042	13.7
Rolaids antacid	16,887	14,878	13.5
Sinutab	12,597	12,472	1.0
Dentyne gum & mints	11,084	9,420	17.7
Lubriderm lotions	10,298	9,717	6.0
Efferdent denture cleaner	9,322	9,277	0.5
Halls	8,500	6,220	37.6

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	4,687	4,196	11.7
Earnings	485	413	17.5
U.S.	**1990**	**1989**	**% chg**
Sales	2,445	2,249	8.7
Operating profit	740	650	13.8
Division sales	**1990**	**1989**	**% chg**
Healthcare	3,061	2,684	14.4
Gums & mints	1,054	1,003	5.1
Other products	582	[illegible]	10.6

CORPORATE PROFILE

Warner-Lambert Co. upped media spending 7.3% to $630.8 million in 1990, reflecting support for new brands like Medi-Flu and significant increases for Benadryl, Halls and Trident.

In addition, the company established a $30 million ad and promotion budget for the early 1991 launch of the Schick Tracer shaving system, that included $17 million in nonmedia support.

Tracer competes directly with Gillette Co.'s Sensor, launched in January 1990. As of April 1991 Tracer had a 1.4% share of the rapidly growing $935 million wet razor category, compared with Sensor's 12.4%, said Andrew Shore, first VP-senior analyst at Prudential Securities.

On the agency side, the company consolidated in April 1991 nearly $200 million in broadcast TV buying at J. Walter Thompson USA, which already handled the majority of that business.

Benadryl was the top-spending brand in 1990 with $34.7 million in media, up 6.4%. Backing for Benadryl Plus Nighttime Formula, launched in July 1989, continued to increase, up 119% to $3.8 million. Benadryl leads the $170 million allergy medicine category with a 40% share, according to Julie Wolfe, senior analyst at business consultancy Kline & Co.

In April 1991 the National Cancer Institute released a study linking cancer to mouthwashes with high alcohol content. The American Dental Association reviewed the study but allowed its seal of approval to remain on Listerine (26.9% alcohol). Listerine is the No. 1 mouthwash with a 30% share of the $800 million U.S. market.

Warner rolled out Extra Strength Rolaids in 1990, backed by $14.4 million in media. Regular Rolaids dropped 86% in spending to $2.1 million. Rolaids has a 30% share of the $750 million antacid category, Ms. Wolfe said.

The company in early 1991 rolled national with Halls Plus, a cough suppressant with a syrup center. Halls Plus received $3.3 million in media. Halls has about 50% of the $330 million U.S. cough drop market.

In August 1990 Warner-Lambert launched Medi-Flu, a tablet and liquid medicine that relieves severe flu symptoms.

American Chicle Corp. in 1990 began testing Cinn-A-Burst gum, which is expected to go national in fourth-quarter 1991. In November a new TV campaign broke for Trident themed "Walk and chew." Chicle trails Wm. Wrigley Jr. Co. in the $1.4 billion U.S. gum market, with a 24%-to-25% share to 48%-to-50% for Wrigley.

In August 1991, Joseph D. Williams stepped down as chairman-ceo. His position was assumed by Melvin R. Goodes, who had been president-chief operating officer.

HEADQUARTERS

Warner-Lambert Co./201 Tabor Rd./Morris Plains, N.J. 07950/Phone: (201) 540-2000.

PERSONNEL, BRANDS, AGENCIES

AMERICAN CHICLE GROUP DIV.: Theodore G. Schnable, vp-sales; Michael Soriano, vp-mktg svcs.

Trident, Clorets, Bubblicious, Halls, Halls Plus, Soothers: J. Walter Thompson USA, New York. Jack Morrissey, sr vp-mgmt dir.

Rolaids, Certs, Sugar-Free Certs, Sugar-Free Certs Mini-Mints, Dentyne, Sugar-Free Dentyne, Junior Mints, Cinn-A-Burst: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

CONSUMER HEALTH PRODUCTS GROUP: Joseph W. Masse, vp-sales.

Listerine, Listermint With Fluoride, Lubriderm, Lubriderm Body Bar, Sinutab, e.p.t., Anusol, Personal Touch shaving products, Schick shaving products, Medi-Flu: J. Walter Thompson USA, New York. Jack Morrissey, sr vp-mgmt dir.

Efferdent: Young & Rubicam, New York. Arlene Brickner, sr vp-grp dir.

Consumer & professional adv: Benylin, Benadryl oral, Benadryl topical, Tucks, Caladryl, new products. Anusol-professional adv: Sudler & Hennessey, New York. Arthur M. Rosen, exec vp-mg dir, consumer adv; Donald Masterson, exec vp-grp dir, professional adv.

RANK: 96

Wendy's International

Dublin, Ohio

Ad spending: **$119.8** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	15	0	NA
Sunday magazine	17	0	NA
Newspaper	27	127	(78.7)
Outdoor	1,570	1,441	8.9
Network TV	40,325	47,907	(15.8)
Spot TV	37,060	36,500	1.5
Syndicated TV	8,342	3,795	119.8

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Source: WSJ 1989 Worldwide Subscriber Study
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Baltimore
Washington, D.C.

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Cable TV networks	3,361	2,744	22.5
Spot radio	376	585	(35.8)
Measured media	91,080	93,108	(2.2)
Unmeasured	28,700	29,300	(2.0)
Total	119,780	122,408	(2.1)
By top brands	**1990**	**1989**	**% chg**
Wendy's restaurants	91,086	92,860	(1.9)

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	1,010	1,070	(5.6)
Earnings	39	30	28.2
Division sales	**1990**	**1989**	**% chg**
Retail sales	922	973	(5.3)
Royalties	80	78	2.6
Other	9	19	(51.8)
Systemwide results	**1990**	**1989**	**% chg**
Company-operated restaurants	922	973	(5.2)
Franchisees	2,148	2,063	4.1
Total systemwide sales	3,070	[illegible]	1.1

CORPORATE PROFILE

Wendy's International is concentrating on streamlining operations and refocusing marketing programs.

In 1990, the company introduced a leaner regional operational structure and added training programs while reducing restaurant management levels, and instituted tighter food and labor controls. The payoff: Net income rose 28.2% to $39.3 million. Sales were harder to come by. Systemwide sales rose to $3.07 billion, up only 1.1%, compared with industry sales of 7%.

Average sales for domestic Wendy's restaurants rose 2.8% to $811,000, still short of the peak $871,000 reported in 1985 when the chain was riding the popularity of its "Where's the beef?" ad slogan.

Wendy's remained the nation's sixth-largest restaurant chain in 1990, and the No. 4 hamburger/sandwich chain with a 7.8% share of category vs. 8.5% in 1989, according to *Nation's Restaurant News.*

Wendy's has avoided joining the rush to price discounting. It also kept its coupon expense to 1% of sales, compared with 3.2% in 1989. That explains in part its 78.9% decline in newspaper spending.

While shunning coupons, Wendy's didn't totally eschew price reductions. One cornerstone of its marketing has been promotion of the Super Value Menu, which prices seven basic items such as the Junior Bacon Cheeseburger, garden salad, baked potato, large-size french fries and soft drinks at 99¢.

Another key has been Senior Chairman R. David Thomas, who's proved to be a popular spokesman for the chain he founded in 1969. Last May, Mr. Thomas appeared in a TV spot for the Super Value Menu with Susan Lucci, star of the daytime drama "All My Children." It was his 75th commercial in a campaign that began in April 1989 and will continue indefinitely, the company says.

Advertising has also focused on Wendy's sandwich menu, which it augmented with a series of limited-time hamburger and chicken offerings including Dave's Deluxe burger and the Chicken Club, Chicken Parmesan and Chicken Cordon Bleu sandwiches. A Grilled Chicken sandwich was added permanently in September 1990.

Named for Mr. Thomas' daughter, Wendy's hasn't forgotten that 33% of fast-food sales are to families with children. The chain increased its ad spending targeted to children. For example, it bought $8.3 million in syndicated TV programming, more than a year earlier. Some of that spending came from its network TV budget, down 15.9%. Last month, Wendy's launched a national promotion touting its kids meal, priced at a permanently lowered $1.99.

Wendy's continues its strategy of assessing 2% of systemwide sales for national advertising and an additional 2% minimum for local advertising and marketing.

Wendy's international presence remains limited: At yearend, it had 291 units outside the U.S., all franchised except for 88 company-operated stores in Canada. The chain intends to revive its international growth, starting with the addition of at least 60 units in 1991.

A series of top management promotions announced early in 1991 moved James Near from president to chairman, a post vacant since the 1989 retirement of Robert L. Barney. Succeeding Mr. Near as president was Gordon Teter, formerly an exec VP. John Casey, previously an exec VP, was named to the new post of vice chairman.

HEADQUARTERS

Wendy's International/P.O. Box 256/4288 W. Dublin-Granville Rd./Dublin, Ohio 43017-0256/Phone: (614) 764-3100.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Charles Rath, exec vp-mktg; Emil Brolick, vp-strategic planning/research; Don Calhoon, vp-corp mktg; Denny Lynch, vp-comms; Tom Hescamp, Ron Krause, Bill Long, Bob Stowe, brand mktg dirs.

Wendy's: Backer Spielvogel Bates Worldwide, Dublin, Ohio. Raymond S. Caruso, exec vp-gm.

Sales promo: Impact, Chicago. Tom Smart, acct dir.

Public relations: Hill & Knowlton, New York. Peter Fleischer, acct dir.

RANK: 87

Wm. Wrigley Jr. Co.

Chicago

Ad spending: **$129.1** million

U.S. AD SPENDING ($ in thousands)

By media	1990	1989	% chg
Magazine	4,879	7,115	(31.4)
Sunday magazine	1,266	564	124.6
Outdoor	1,010	395	155.7
Network TV	42,394	54,263	(21.9)
Spot TV	31,498	27,137	16.1
Syndicated TV	23,295	12,203	90.9
Cable TV networks	10,223	8,040	27.1
Network radio	3,713	4,135	(10.2)
Spot radio	43	0	NA
Measured media	118,321	113,852	3.9
Unmeasured	10,800	10,400	3.8
Total	129,121	124,252	3.9
By top brands	**1990**	**1989**	**% chg**
Wrigley's gums	117,251	112,997	3.8

SALES & EARNINGS ($ in millions)

Worldwide	1990	1989	% chg
Sales	1,111	993	11.9
Earnings	117	106	10.2
U.S.	**1990**	**1989**	**% chg**
Sales	715	674	6.0
Operating profit	112	109	2.3

CORPORATE PROFILE

Wm. Wrigley Jr. Co. bolstered three of its four flagship brands with extra flavor, doubled ad spending and fresh positionings in 1990.

Wrigley protected its leading position with a 3.9% increase in media last year that paid off in an 11.9% increase in worldwide sales, to $1.1 billion. Wrigley's U.S. operations posted a 6% increase in sales, although analysts expect future growth to come from overseas.

In 1990, Wrigley began to actively market its products in eastern Europe, including Czechoslovakia, Hungary, Poland and Yugoslavia, and experienced volume growth in western Europe after political changes in Germany.

The company's No. 1 brand in dollar sales, sugar-free Extra, also was its most heavily advertised; spending was up nearly 15%, to $28.2 million. In 1991, the company added print ads to its "Lasts an Extra long time" campaign. Wrigley, which in 1989 added cinnamon and "winter fresh" flavors to the Extra line, this year is rolling out a new Classic Bubblegum flavor. Sugarless gums now account for nearly half of U.S. gum sales. By early 1990, Extra had moved past American Chicle Corp.'s Trident and RJR Nabisco's Care-Free to take over leadership in that market, with about a 45% share.

Wrigley took unusually aggressive marketing moves in 1990 for two of its other "classic" brands, Doublemint and Spearmint.

Doublemint's media budget doubled, to $27.5 million, as Wrigley and agency BBDO, Chicago, introduced a new campaign and tagline. Gone are the Doublemint twins and the "Double your pleasure, double your fun" jingle—although some elements of the gum's 30-year campaign remain. The new TV campaign uses a "No single gum" tagline and a host of double exposures—some sets of twins but other repeating images as well.

Beginning in November, Wrigley put all Spearmint media dollars behind its campaign positioning the gum as a smokers' alternative. TV and radio spots, print ads and billboards describe situations where smoking is banned or a problem—and offer Spearmint as an option. Wrigley spent $20.7 million spreading the Spearmint "Pure chewing satisfaction" message in 1990; Spearmint is the company's No. 2 brand in unit sales, behind Doublemint.

Wrigley has maintained a steady 48% to 50% share of the $1.4 billion U.S. gum business, followed by a 24%-25% share for American Chicle, a Warner-Lambert Co. unit, according to American Consulting Corp. Wrigley has six of the 10 biggest gum brands in the country, with Extra, Juicy Fruit, Doublemint, Spearmint, Freedent and Big Red.

HEADQUARTERS

Wm. Wrigley Jr. Co./410 N. Michigan Ave./Chicago, Ill. 60611/Phone: (312) 644-2121.

PERSONNEL, BRANDS, AGENCIES

CORPORATE: Douglas S. Barrie, grp vp-intl; Ronald O. Cox, grp vp-mktg; Anthony Cipollina, vp-sales; Gary Beebe, Susan Fox, asst vps-mktg.

Wrigley's gums: BBDO, Chicago. Tonise Paul, sr vp-mgmt super.

AMUROL PRODUCTS CO.: A.G. Atwater, pres.

Amurol products: Leo Burnett USA, Chicago. John Kovas, acct dir.

Methodology to Top 100 ranking

Rankings

The 100 Leading National Advertisers are selected from the 200 largest advertisers based on measured U.S. ad spending (see below) in calendar 1990. Companies spending at least $31.3 million (up from $29.5 million in 1989) in measured media make up this group of 200. Those companies are ranked by the sum of their measured and unmeasured expenditures. This report profiles the top 100.

Meas[illegible]edia & monitoring services

In this [illegible]t, media advertising refers to ad exp[illegible]itures in national consumer media tha[illegible] are monitored by LNA/Arbitron Multi-Media Service.

The media breakouts labeled "U.S. ad spending" at the beginning of each company profile were provided by LNA/Arbitron. References within the corporate profile to media spending in virtually all cases refer to numbers from LNA/Arbitron.

Media totals also are for calendar years 1990 and 1989.

Ten measured media

Magazine: Publishers Information Bureau monitors 174 consumer magazines, four of which are national Sunday magazines. Newspaper: LNA/Media Records measures and projects newspaper data to 125 markets for all categories except financial and retail ad spending, which are not projected and represent 41 and 36 markets, respectively. Sunday magazine: PIB measures four Sunday magazines. Media Records measures 34 and projects spending based on one-time open inch rates to 125 markets. Outdoor: LNA Outdoor measures poster and paint boards in more than 200 plant operator markets. Network TV: Arbitron records every minute of ABC, CBS and NBC network TV and calculates ad spending by applying program rates to each spot. Spot TV: Arbitron monitors TV stations in 75 markets, 17 of which are monitored daily, and 58 once a week. Syndicated TV: Arbitron gathers rates from advertisers and agencies and applies the rates to national spots bought by advertisers. Cable TV networks: Arbitron monitors the Family Channel, Cable News Networks, ESPN, MTV:Music Television; USA Network and Superstation WTBS around the clock. Estimated rates are applied to advertisers. Network radio: Arbitron monitors 17 radio networks. Spot radio: LNA compiles data from national stations' representative organizations, yielding spending for nearly 2,500 stations in more than 200 markets.

Unmeasured spending

Unmeasured spending figures are *Ad Age* estimates and include direct mail, promotion, co-op, couponing, catalogs, business and farm magazines and special events, to name a few. Corporate annual reports, 10-K forms, corporate sources and *Ad Age* reporters help compute this number. Unmeasured advertising does not include corporate overhead, overseas ad spending or most local ad spending.

Brand spending

Ad spending by top brands presented in tabular form at the top of each profile includes LNA/Arbitron's 10 measured media only. Brands listed in the tables must have spending greater than $5 million and be among the company's top 10 brands—the maximum listed.

Brand expenditures represent total spending by an LNA designated "tradename" within a PIB subclass.

For example, in the Philip Morris Cos. profile, "Kraft cheeses" and "Kraft salad dressings & mayonnaise" are listed as top brands, even though they both carry the "Kraft" name. The two are in separate PIB subclasses and are considered separate tradenames by LNA.

Personnel, brands, agencies

Following each corporate profile is a listing of personnel involved with various aspects of the company. Only the very top corporate executives involved in the marketing sequence are listed. The agency listed on the account includes only the point person on that account.

Sales and earnings

Worldwide, U.S. and division sales and earnings are taken from public documents. Within the profile, references to sales and earnings are generally for calendar reporting periods, because most companies are on such a reporting schedule. However, if a company reports on a fiscal basis, its yearend closing is indicated in the corporate profile.

While ad figures represent U.S. spending only, worldwide headquarters are listed because some large corporate advertisers include divisions which are not related in the U.S. Spending by Philips NV, for example, includes North American Philips Corp. and Polygram Records Corp.

Corporate composition

Parent company totals for advertising spending are pro forma for 1990 and 1989—and include 100% of the ad spending of companies they either acquired or agreed to acquire as of Aug. 1, 1991. Similarly, companies or divisions divested before Aug. 1, 1991 have been excluded. This procedure eliminated Continental Airlines Holdings from the Top 100 this year. The airline holding company, ranked No. 94 in last year's report, sold off Eastern Airlines early this year. Without Eastern, Continental's ad spending fell below the cutoff.

—Kevin Brown

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Top 25 magazine advertisers

Rank	Advertiser	Magazine spending 1990	1989	% chg
1	**Philip Morris Cos.**	**$260.0**	$281.5	(7.6)
2	**General Motors Corp.**	**207.2**	213.5	(3.0)
3	**Ford Motor Co.**	**148.9**	142.8	4.3
4	**Procter & Gamble Co.**	**146.6**	118.8	23.4
5	**Chrysler Corp.**	**103.5**	130.9	(20.9)
6	**RJR Nabisco**	**78.8**	132.8	(40.7)
7	**Toyota Motor Corp.**	**77.9**	53.2	46.5
8	**Grand Metropolitan**	**76.7**	69.4	10.5
9	**Unilever NV**	**70.9**	73.0	(2.9)
10	**Nestle SA**	**69.4**	77.8	(10.8)
11	**Time Warner**	**67.6**	60.1	12.5
12	**AT&T Co.**	**64.1**	71.1	(9.8)
13	**Honda Motor Co.**	**61.3**	56.7	8.2
14	**American Brands**	**60.8**	55.6	9.3
15	**Kmart Corp.**	**55.3**	35.6	55.6
16	**Sony Corp.**	**53.2**	51.5	3.4
17	**Revlon Group**	**52.4**	59.1	(11.4)
18	**Nissan Motor Co.**	**50.2**	31.3	60.0
19	**Mazda Motor Corp.**	**48.5**	39.1	24.2
20	**Eastman Kodak Co.**	**44.3**	45.7	(3.0)
21	**Bristol-Myers Squibb Co.**	**42.0**	44.2	(5.1)
22	**Capital Cities/ABC**	**39.0**	34.8	12.0
23	**General Electric Co.**	**37.2**	39.1	(4.8)
24	**Allied-Lyons**	**36.1**	37.2	(2.9)
25	**CBS Inc.**	**35.8**	34.0	5.2

Note: Dollars are in millions. **Source:** LNA/Arbitron. See Page 71 for methodology and other source information.

AA chart: Kevin Brown

Top spenders

(Continued from Page 1)

fell to second in spot TV despite a 7.5% increase in that medium.

Food and beverage marketers especially felt the effects of a sagging economy that touched virtually all spending. Of the 24 major food advertisers among the Top 100, 16 cut ad spending in 1990 while aggregate ad spending remained flat at $11 billion.

"Less," whether in calories or cholesterol, also steered food and drink trends in 1990. Philip Morris' Kraft General Foods introduced fat-free products ranging from cheese to salad dressing to mayonnaise. No. 38 Sara Lee Corp. brought out light sausages and franks, and No. 31 Ralston Purina Co. lightened its Hostess Twinkies.

Making many of those entries possible were fat and sugar substitutes such as Simplesse and NutraSweet from No. 100 Monsanto Co., a new entry to the list. Thompson Medical Co./Slim-Fast Food Co. vaulted from No. 125 a year ago to No. 85 on the basis of heavy advertising for the Ultra Slim-Fast line—now billed as a meal replacement rather than an appetite suppressant.

With health benefits gaining such marketing cachet, companies were bound to run into regulatory woes. No. 14 Nestle SA, anticipating industrywide scrutiny from the FDA, took the "fresh" off its Contadina label. P&G eliminated "fresh" from Citrus Hill after a product seizure by the feds; P&G eliminated "no cholesterol" on the Crisco label; Philip Morris removed percentage fat-free labels.

Changing eating habits and the recession spurred the nation's fast-food chains to respond with a panoply of new treats, including the much ballyhooed McLean Deluxe burger at No. 8 McDonald's Corp.; value menus became common at most of the big chains.

The 12 retailers in the Top 100, struggling through the year, increased ad spending only 3.7% to $4.7 billion. Five spent fewer ad dollars in 1990 than in 1989. Wal-Mart Stores, No. 70, passed No. 9 Kmart Corp. and Sears in total sales even though Sears' Merchandising division outspent by almost nine times Wal-Mart's largely vendor-funded ad total.

Indications are that 100 Leaders' spending in 1991 will continue to be mixed. Even auto advertising slowed to a modest 6.6% growth in first quarter '91 among the 29 leading auto brands. The 10 auto companies among the Top 100 spent a relatively robust $4.6 billion in advertising in 1990, up 11.8%.

Amid the sluggish spending is speculation that Philip Morris, generating $18 billion in cash flow over the next five years, is primed to invest in a major international food company, perhaps making P&G's return to the top short-lived. □

Top 25 newspaper advertisers

Rank	Advertiser	Newspaper spending 1990	1989	% chg
1	**May Department Stores Co.**	**$218.2**	$208.2	4.8
2	**R.H. Macy & Co.**	**160.1**	183.6	(12.8)
3	**Sears, Roebuck & Co.**	**136.8**	154.9	(11.7)
4	**Federated Department Stores**	**134.5**	144.0	(6.6)
5	**Dayton Hudson Corp.**	**106.2**	107.5	(1.2)
6	**Montgomery Ward & Co.**	**82.1**	67.2	22.1
7	**Kmart Corp.**	**80.1**	58.6	36.7
8	**Carter Hawley Hale Stores**	**72.8**	66.9	8.9
9	**J.C. Penney Co.**	**70.6**	81.4	(13.2)
10	**American Stores Co.**	**69.6**	81.9	(15.1)
11	**AMR Corp.**	**60.7**	41.0	48.1
12	**Highland Superstores**	**49.0**	36.2	35.3
13	**General Motors Corp.**	**46.6**	55.7	(16.3)
14	**Time Warner**	**46.2**	43.1	7.2
15	**AT&T Co.**	**43.8**	39.7	10.2
16	**Tengleman Group**	**42.8**	20.9	104.3
17	**Circuit City Stores**	**41.3**	37.6	9.7
18	**Tandy Corp.**	**40.5**	37.6	7.7
19	**Woodward & Lothrop**	**38.1**	39.8	(4.2)
20	**Walt Disney Co.**	**36.7**	24.6	49.1
21	**Sony Corp.**	**36.1**	30.3	19.3
22	**Matsushita Electric Industrial Co.**	**33.0**	28.9	14.2
23	**Delta Air Lines**	**32.9**	28.5	15.5
24	**Dillard Department Stores**	**32.9**	30.3	8.6
25	**Ahold International**	**31.0**	27.6	12.2

Note: Dollars are in millions. **Source:** LNA/Arbitron. See Page 71 for methodology and other source information.

AA chart: Kevin Brown

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